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This book presents 19 chapters on alumni relations. The chapters are: (1) "Alumni Admissions Programs" (Susan Clouse Dolbert); (2) "Alumni Clubs, Chapters, and Branches: Bringing the Institution to the Alumni" (John A. Feudo); (3) "Alumni Records" (Agnes Papke); (4) "Successful Alumni Travel Programs" (Duncan Beardsley); (5) "Board and Volunteer Management" (Gabrielle Korn); (6) "Alumni Career Services" (Leonard M. Contardo, Jr.); (7) "Alumni Community Service Programs: Beginning or Bettering Your Alumni Association's Community Service Program" (Ed Trifone); (8) "Continuing Education" (Dawn M. Dempsey); (9) "Homecoming" (Sheila M. McDaniel); (10) "Activating an Effective Alumni Legislative Network" (Margaret Sughrue Carlson and Les Heen); (11) "Building an Effective Alumni Merchandise Marketing Program" (R. Wayne McDaniel); (12) "Membership Programs" (Loren R. Taylor); (13) "Reunions" (Dan White); (14) "Collaborations Between Student Affairs and Alumni Relations" (Margaret R. Jablonski); (15) "SAA: Student Involvement in the Alumni Profession" (Keith E. Brant); (16) "Technology in Alumni Relations" (Andrew B. Shaindlin); (17) "Working with Other Departments" (Janet C. Emery); (18) "Young Alumni Programming: Transforming Our Future Today" (Innes van Nostrand); and (19) "Career Paths" (Peter E. Steiner). (Contains 66 references.) (DB)

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ALUMNI RELATIONS

THE NEWCOMER SERIES

Edited by John A. Feudo

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FOREWORD

I appreciate the importance of this comprehensive project, and I thank my colleague John Feudo and the editors at CASE for the opportunity to comment on alumni relations today and the way the field has changed since my introduction to the office of alumni affairs at Duke during my undergraduate days in the late '50s. That's right, the '50s. The student job as a part-time "gopher" led to a full-time position as assistant director of alumni affairs a week after graduation. I have spent more than 30 of the intervening years in alumni affairs at Duke, since 1982, as director.

My early days as a young alumni affairs staffer were exciting and interesting. I had responsibility for portions of the clubs and reunions program, several schools and class groupings for the Duke Loyalty Fund (the annual fund program) and for minor writing and advertising assignments for the Duke Alumni Register, the university's flagship publication. I was involved in all three aspects of institutional advancement as the profession is defined today. It was a varied experience that has been extraordinarily useful in later years as my responsibilities have increased.

Over the years, institutional advancement has become much more specialized and fund raising has outstripped communications and alumni relations in relative importance at most institutions. Rarely, except in the smallest of shops, is it possible today for alumni affairs staff members to be involved significantly in fund raising and communications. Still, there are some constants that define the field; they might be seen as representing a philosophy to guide alumni relations professionals. My hope is that the following comments will be useful as points of reference for newcomers to the field.

Treat alumni as family. My first boss, the legendary Charles A. Dukes, who served

as director of alumni affairs at Duke for more than 20 years, taught me this concept. When members of the family leave home, one tries to stay in touch by letter and other communications. Alumni associations do this with newsletters and magazines. Occasionally members of the family are invited back home to celebrate special occasions and milestones and to see old friends. Alumni associations organize reunions, homecomings, and other occasions directed to alumni, and participate in campus milestones like commencements. Alumni are part of the institutional family and should be treated as full members of that family. Alumni also deserve the right to be taken seriously in their opinions about the institution's direction.

Alumni most often represent the institution's largest and most permanent constituency. While faculty, administration, and students are the three constituencies most visible on college and university campuses, alumni— who are major supporters of, and stakeholders in, the institution— deserve inclusion in campus dynamics. Often, the alumni association's most difficult task is to remind campus decision-makers of the significant role alumni have to play in the life of an institution. Alumni staff should suggest how to appropriately and effectively make use of the talents, energy, loyalty, and institutional memory of alumni.

While it is very difficult to generalize about alumni, I think it is fair to say that most are interested in academics, admissions, and athletics. Certainly these are the three topics that more often arise in alumni meetings. Alumni officers must be comfortable and conversant with such issues— and particularly with the institution's academic progress, since alumni consider their degree an asset whose value is directly related to an institution's commitment to excellence.

Alumni officers are part of the academic enterprise; alumni officers are educators. This fact must be recognized in organizing alumni programs, activities, and publications. Learning opportunities provide a common link, a way for alumni to connect and reconnect with one another— and with the institution. Our campuses are devoted to nurturing the life of the mind, and alumni officers should tap into the intellectual resources of our institutions while recognizing our graduates' passion for learning. One distinguished alumni director suggested to his fellow alumni directors at a conference organized by the Council of Alumni Association Executives that every alumni program needs an academic, educational rationale. Students come to our institutions for many things, but primarily for an education.

Is alumni affairs a profession? Certainly alumni affairs has become more professional over the years with ongoing consideration of criteria for credentialing. Alumni affairs is vital in sustaining and renewing academic institutions; it requires

strategic thinking and communication skills that we associate with professionalism.

Is alumni affairs just a stepping stone to other career opportunities in academic administration or in fund raising? In some cases, but not necessarily. Alumni affairs is also for the long-term; its rewards come from commitment to the institution's core values. I would counsel anyone interested in the field, or new to the field, to consider alumni affairs not as a route to riches, but as a calling. Enthusiasm for the task and love of the institution are essential prerequisites for a successful alumni affairs practitioner.

I am constantly reminded that the alumni office is by default the institutional memory and the keeper and disseminator of institutional traditions and values. A successful alumni affairs staff member will take this to heart. So, if you don't know the words and music of your school's alma mater, learn them.

Laney Funderburk, Jr.
Associate Vice President
Director, Alumni Affairs
Duke University

PREFACE

When I first thought about writing this preface, my mind immediately recalled that catchy (some may call it obsessive) tune you hear whenever you enter an FAO Schwartz store: "*Welcome to our world, welcome to our world!*"

Working in alumni relations often is like being in your own little world. If you listen to questions and comments from people who don't understand our business, you'll know why most people believe we really *are* in our own world:

- "Do you work during the summer?"
- "I wish I had a job where all I did was throw/attend parties."
- "I graduated from here, so I could do this job."

and a personal favorite of mine:

- "Does this mean you can get the school to accept my (fill in friend or family member here)?"

The world of alumni relations is far different from what most people think. First and foremost, this is a business—a big business. Depending on the size of your program, hundreds of thousands of dollars may flow through your office each year, including money from event registrations, membership dues, annual fund gifts, merchandise sales, and much more.

Because this is such a big business, it is staffed by professionals—people who bring to the job a certain level of expertise and energy. Gone are the days when the alumni director's chair is simply handed on a silver platter to the former coach who has been asked to find a new day job or to someone whose primary qualification is being an enthusiastic alumna. Don't get me wrong: Some coaches make great alumni staff members, and it never hurts to have an enthusiastic alum (or six) on your staff. These people all bring special skills that make them valuable to the office, the institution, and the profession.

Most important, alumni relations professionals make a difference. What we do affects the institution, its students, and its largest constituency—alumni. I like to think that what I do every day has the potential to touch the lives of hundreds of thousands of people, on campus and all over the world. This perspective enhances my job satisfaction and inspires me to work just a little harder for all of the people who count on me for services such as information about their alma mater, career networking assistance, and opportunities to meet socially with others who share at least one very important characteristic—a degree from the institution.

Because what you do is so important to the life and future of your institution, be prepared to work hard. Yes, you will go to parties—a lot of them. You also will put in many hours of work and shed blood, sweat, and tears (mostly sweat, just a few tears, and hardly ever any blood) to make sure that everyone attending those parties has a terrific time. You'll get stressed out from time to time worrying about the details of each event, and you'll find that you are your own worst critic. Keep in mind, however, that the average attendee does not even notice most of what you see going "wrong" at an event. Alumni attend an event for specific reasons: to socialize, to learn, to network, to enjoy. As long as their goals are met, your program is a success. Chances are, the attendees don't care if the tablecloths happened to be white (even though you ordered blue). At the end of each program you manage to feel good about your success. Don't confuse happiness with satisfaction, however. You should be completely satisfied only if your event was perfect. Otherwise, your satisfaction will come from knowing what you can do to make the next program even better.

My alumni relations philosophy is that our Fridays end on Saturday, and our Mondays start on Sunday. We work long and hard, but I have never been in another profession that has been so fulfilling and rewarding. Use your expertise, creativity, and enthusiasm to help serve your alumni and make your institution a better place tomorrow than it was yesterday. Above all, enjoy what you do, and find comfort and assurance in the knowledge that you will be making a difference in the lives of others every single day.

I am grateful to my friends and colleagues who served as authors for this book. Your knowledge, experience, and friendship are valued and appreciated. Special thanks to my assistant, Linda Rogers, who not only was a tremendous help with this book, but who makes each day on the job a little easier and a lot more fun.

John A. Feudo
June 1999

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ALUMNI ADMISSIONS PROGRAMS

Susan Clouse Dolbert

Arizona State University Alumni Association

The alumni association is a unique and integral part of every college, university, or independent school. The association itself is made up of former students; typically, it is loosely constructed and sometimes resides outside the actual administration of the institution. Our institutions have recognized that former students—their alumni—represent a significant and vital constituency. For their part, many alumni recognize that their relationship to their alma mater is based on more than school-time memories. Their interest in the institution is more active. Alumni want to be kept informed; feeling educated about the current nature of the institution is a strong factor in their willingness to participate in programs and activities sponsored by the institution or the alumni association.

As with most volunteer-based organizations, alumni associations continually look for the balance that keeps volunteers engaged and involved with the association and their alma mater. Institutions want to provide alumni with ways to serve that are meaningful to both parties. Institutions also must recognize that alumni are busy people and avoid overloading volunteers.

Utilizing selected alumni in admissions may be the ideal alumni-alma mater partnership. This approach provides an appropriate avenue for the college or university to ensure that the alum is kept up-to-date with regard to academic programs, student activities, and campus living, and it provides prospective students with an opportunity to talk with former students who have "been there, done that." Alumni can assist with recruitment, admissions, and orientation. The alums can select their own level and type of involvement: They may attend a single recruitment event, interview every prospective student who lives within a 50-mile radius of their homes, or be part of a

formalized program of activities. Alumni in admissions also can provide institutions with a cost-effective way to reach student prospects. Large universities with national recruiting programs and small schools with geographically focused recruitment bases can enlist alumni in these efforts.

Once an institution makes the decision to involve alumni, selection and training of volunteers become extremely important. Every alumni director has cringed over reports of an alum recalling a story about an inaccessible faculty member or a freshman math class held in the football stadium.

It is essential to recognize these programs as part of the admissions office. Although alumni can assist the admissions staff in many ways, such relationship-based programs require a great deal of staff time. The admissions staff must coordinate every aspect of alumni involvement, beginning with selection and training, so that they view the alumni as partners in the recruitment effort and are willing to dedicate some of their own staff to make these programs successful.

Before you make a decision to begin a program with alumni, you should consider some key issues. First, based on institutional goals and recruitment strategies, are there useful roles for alumni? If an institution has decided that its recruitment program will be based solely on direct mail and visits by admission representatives, it hardly makes sense to announce a program to alumni that does not provide a legitimate role for them to play.

Second, what kind of budget do you need to produce the program you are considering? Who is committed to providing funds to make this program happen? Are the alumni and admissions offices willing to reallocate funds from other programs? Can you garner additional funds from the division of student affairs or the office of the provost?

Third, how much staff time will be needed to manage the program? Should the staff be housed in admissions or alumni? To whom should the staff report and be accountable?

Fourth, how will success be evaluated: By increased student enrollment? By improved academic credentials of the entering class? By input from the new students? By input from participating alumni?

The answers to these questions should lead to a discussion of the pros and cons of alumni involvement with recruitment, admissions, or orientation and a decision about whether to develop such a program.

SELECTION AND TRAINING OF ALUMNI PARTICIPANTS

Once you decide to develop an alumni admissions program, your most important task is to identify and select alumni participants. Some institutions have put out a "call to serve" through their magazine, newsletter, or organizational network. Lawrence Technical University has successfully identified bright and talented alumni for its Support Team of Alumni in Recruitment of Students (STARS) by placing a postcard in each issue of its quarterly magazine. Other institutions have tried to use a more selective approach. The most selective strategy might be to go through rosters of former student leaders: past student alumni or foundation members, campus tour guides, or student government officers. Depending on the numbers involved, you may decide to tap additional groups (including fraternities and sororities).

Another approach might be to work through the leadership of the alumni association's constituent groups. Strong chapter and club leaders can help identify and contact alumni who would work effectively with prospective students. In this scenario, the chapter or club leader will know the skills and personality of the individuals they recommend, so the admissions staff will be comfortable with them as well. Bryant College recommends involving alumni no more than 10 years out so their experiences are still relevant to the prospective students—although with careful selection and training, many colleges and universities have included a wider range of alumni in certain aspects of admissions programs.

Although most of these methods appear to be reliable in selecting good institutional representatives, some alumni may not be quite able to separate their own personal experience from their overall view of the institution. The institution may find itself with someone who doesn't take the time to learn which majors and programs still exist on campus. In that case, it is helpful to have term limits in place. When recruiting alumni, the institution should ask for a three-year commitment. Once the term is up, the alum can make a graceful exit. If the alum has been a good addition to the program, however, the institution may offer a new term.

Training of alumni identified to participate in the program is essential to its success. Every program should have a training/resource manual. Some institutions supplement written materials by bringing volunteers back to campus on an annual basis, though this approach generally is unrealistic. A training video or involvement of alumni through teleconferencing or video conferencing can substitute for the in-person workshop. Another alternative is to have an admissions representative meet with the alumni volunteer while the representative is recruiting in the alum's home

area. Whether they meet for a cup of coffee or to have lunch, such one-on-one time between a knowledgeable staff member and a volunteer is extremely helpful. An individual meeting can educate alumni about the institution, provide them with a personal contact to whom they can refer prospective students who have specific questions, and increase the staff member's confidence in the ability of the alumni to represent their alma mater.

Some institutions, however, may not be able to arrange training sessions or individual meetings with alumni. For these institutions, the only option is to provide written materials. Keep in mind that current students often do not read official campus documents while they are attending the institution, so alumni may not have developed a proclivity for reading documents from their alma mater.

A well-prepared training manual provides alumni with the confidence to assist in many admissions-related programs, and it provides the admissions office with confidence that alumni have the correct information at hand. A training manual that covers many areas can be used to ensure that alumni learn about their alma mater and understand the mission and goals of the institution. A well-designed training manual should include the following components:

- Mission statement of the institution
- Outline of institutional recruitment goals
- Profile of desired freshman class
- Review of each academic program
- Brief description of academic-related services (e.g., tutoring)
- Review of student services
- Directory of office telephone numbers
- Listing of key faculty and staff members
- Glossary of terms
- Most often asked questions, with answers
- Academic calendar.

The training manual should be updated annually and distributed widely. Training manuals can be bound or prepared for a three-ring binder so alumni can update their notebook whenever a major change occurs. More and more institutions now use e-mail to communicate with their alumni volunteers, so updating them with important news or changes is easy. The development of alumni Web sites has provided additional opportunities to educate alumni about changes or to introduce new programs.

ALUMNI IN RECRUITMENT

Many colleges and universities begin to recruit students prior to their senior year in high school. Recruitment programs include events held on campus, in hotels or restaurants, or in alumni homes. Alumni can be a part of any of these events. At Arizona State University (ASU), the alumni association hosts an annual dinner and recognition ceremony for the outstanding junior student from each Arizona high school. The association attempts to have an alum sit at each dinner table, so the student and his or her parents can ask questions of someone whom they may view as more credible than a faculty or staff member. Each year, written comments from participants validate the helpfulness and influence the alumni have on the students and their parents. The alumni themselves come away overwhelmed by the quality of students ASU is recruiting.

Other formal recruitment programs, generally held in hotels or restaurants, may also include alumni. Such programs often provide an opportunity for alumni to talk about their student experiences, what they are doing professionally, and how their experience at their alma mater helped prepare them for their careers. In programs outside the geographic area of the institution, many local alumni are willing to serve as contacts for follow-up questions, until the day the student actually leaves home to enroll at the college or university.

Institutions that recruit outside of their immediate geographic area most commonly enlist alumni in recruitment programs at high school career or college nights. Generally, these events take place on the high school campus. The high school invites colleges and universities to set up tables and talk to interested students. Students visit the tables of the colleges and universities in which they have an interest, talk to the alumni present, pick up recruitment and application materials, and request specific information regarding admissions, academic programs, or student life. The University of Redlands found success in sending alumni pairs to these events. One member of each pair is a recent graduate, who can relate to the high school student; the other member is a more "seasoned" alum who can reassure the student's parents.

Obviously, the vast majority of institutions cannot afford the staff time or travel costs to have a college or university representative attend an individual high school's career or college night. In fact, the admissions representative visiting individual high schools has become an old paradigm. For example, University of Dayton recruiters used to visit 1,500 high schools each year but now visit no more than 400—most of which are nearby.

Other high schools ask for a college or university representative to attend high school honors and awards assemblies, where the receipt of scholarships is recognized. Again, because of the immense numbers of high schools involved, alumni often represent the college or university. This type of involvement can be positive for the high school and the college or university; in many cases, the alum already has a personal relationship with the high school, either as a graduate of the high school or as the parent of a student at the school. Often, the scholarships being presented are from the alumni association itself or, even better, from the local chapter.

In each of these instances, alumni often are the best substitute for college or university staff members, as long as the alumni are comfortable in the knowledge of their alma mater. With training and up-to-date resource materials, alumni should be able to serve as effective recruiters, even far from their alma mater.

Recruitment is not always an in-person activity. The telephone has proven to be a powerful recruitment tool and can be used by any institution either proactively or in reaction to a request. A telephone call can be made any time during the recruitment process: while a student is still a prospect, during the application process, and particularly during the "deciding to enroll" phase. For example, the first call may take place after the college or university receives a student's strong ACT or SAT score or a student's request for information about the institution.

Telephone calls can be part of a formalized group telethon—complete with pizza and soda for the alumni callers—or private calls from the alum's home. Because alumni may be making the calls from their homes, they must be trained sufficiently so they feel confident in making the calls and reassured that they need not answer every question; alumni should be willing to pass the student's question to a staff member or to find the information and call the student back.

Bowling Green State University developed an interesting recruitment strategy: the "clip-kit" program. Alumni anywhere in the country read an article in their local paper about an outstanding student, clip it out, and send it on to the Bowling Green admissions office. The university then follows up with a personal note of congratulations to the student.

If the institution and its alumni have been successful, the students they are recruiting fit their ideal student profile and have become interested enough in the institution to file an application for admission. Once the student has applied for admission, the alumni role becomes very personal.

ALUMNI IN ADMISSIONS

During the admissions process, alumni most commonly play the role of interviewer. Again, for many colleges and universities with national or international student bodies, alumni can provide valuable input. Moreover, many alumni regard this activity as meaningful and helpful to the institution. The comments of a 1994 Northwestern University alumna are indicative of the alumni view: "This was my first year interviewing prospective students. I felt like Northwestern really took my comments seriously. In all five of the applicants I interviewed, the university made the same decision I did. I can't ask for more than that. I really enjoyed meeting the prospective students—and it made me feel good to help my alma mater."

The admissions phase is another excellent opportunity for the alumni telephone call. The average high school senior applies to five colleges or universities; therefore, it is important to recognize that an admissions application in no way ensures enrollment. For those students in whom there is significant institutional interest, the recruitment process continues once the application is submitted. In this instance, the alum must be aware of specifics regarding the student and his or her interests. An alum who is successful in the career in which the prospective student has an interest may be the ideal caller. Obviously, a program of this nature requires a commitment of time on the part of the institution to match alumni with prospective students, but the rewards in enrolling exceptional students make the effort worthwhile.

Involving alumni with prospective students does not end once the student is admitted; in fact, alumni can be involved in a number of areas. Most of these activities fall under the umbrella of orientation.

ALUMNI IN ORIENTATION

Orientation has become a program with great breadth and depth. Once, orientation was no more than an opportunity for students to take placement exams and register for classes; today it has evolved into programs designed to assist students in their transition into college or university life. Orientation programs also can include the incoming student's first introduction to the institution's student alumni association (SAA) or similar organization—perhaps encouraging the student to take his or her first step toward involvement as an alum.

Orientation programs may begin as early as five months prior to enrollment, as students come to campus to register for the subsequent term. Generally, these early

orientation programs are several hours in duration; they provide a quick review of academic and student programs and conclude with registration for classes. Parents are invited to accompany students, but most of their activities are separate from their sons or daughters. Alumni panels, in which students and their parents can ask alumni questions about their experiences at the institution and their current professional situations, have proven to be successful joint programs, however.

A number of major universities conduct out-of-state orientation programs in areas from which they enroll large numbers of students. The format is similar to that of the early orientation programs held on campus; the only difference is that the questions the students and parents ask may be more specific to enrollment and everyday living. On-campus programs, where students and parents are more familiar with the campus and its surrounding environment, tend to allow for longer-term thinking and concerns about the selection of majors and careers.

Another orientation program that takes place in locations away from the campus is the send-off event. Send-offs are held in the summer, usually six to eight weeks prior to the beginning of the fall term. Most often, the alumni association and the admissions office jointly sponsor send-off events. For send-offs, the institution invites students and parents to the home of an alum so they can ask last-minute questions and meet other incoming students from their local area. Again, students and parents are separated, so that all feel free to ask questions. In this environment, the younger alumni in attendance usually facilitate the student group, while the more mature alumni respond to parental concerns. For a chapter that presents scholarships to local students, the send-off is the ideal venue to highlight this program.

On- and off-campus orientation programs and send-offs also provide institutions with opportunities to introduce incoming students to the SAA, making information and sign-up forms available so incoming students can be part of a student alumni group early in their college careers.

A final opportunity for alumni to be involved with incoming students can occur during the week students and their families arrive on campus to move into their residence halls. At Arizona State University—where temperatures are well above 100 degrees by the end of August—the alumni association, in cooperation with the SAA, sets up tables outside each residence hall and provides lemonade and water for students and their parents throughout move-in day. This activity also has provided an opportunity to share information about the alumni association and SAA. The alumni associations at ASU and Ohio State University produce a "Traditions" booklet that is distributed to new students during orientation. The booklet tells students about the

university mascot, fight song, and alma mater and provides historical trivia about the institution.

The University of Redlands has managed to survey their new freshmen during this week, particularly asking if former students were helpful during the recruitment process. The results from this survey have reassured the admissions office that alumni are valuable partners.

CONCLUSION

Although this chapter may have provided some ideas on creating an alumni admissions program, an institution can and must develop its own individual program that will use alumni most effectively in its environment. Clearly, however, some tried-and-true activities can be adapted to a wide variety of institutions.

Enlisting alumni in admissions can have another strong benefit for the alumni association. Such programs can enable the association to discover and develop volunteers who may evolve into strong association leaders. Chapter leadership, involvement with scholarship development, or service on the alumni board of directors are potential results of alumni involvement that begins with the recruitment of new students.

Remember, however, that these programs must be well-planned, with consideration to the size and complexity of the institution and its recruitment program. The use of alumni in the admissions process should be viewed as an enhancement to an established recruitment program and should fit well with the institutional mission and with the overall recruitment goals. The institution must make a long-term commitment to the success of the program by committing the staff and resources of the admissions office and the alumni association. Lastly, effective use of alumni volunteers provides the best assurance that these programs will be successful. The volunteers must be well-prepared and enthusiastic about their work with incoming students. If all these bases are covered, success is certain.

2

ALUMNI CLUBS, CHAPTERS, AND BRANCHES

Bringing the Institution to the Alumni

John A. Feudo

University of Connecticut Alumni Association

Wouldn't it be great if all of your alumni returned to your institution every year? Imagine if they came back two or three times—year after year! The bad news is that you have a better chance of coming up with the right Powerball lottery ticket than seeing every alum back on campus each year. The good news, however, is that you can bring your institution to your alumni—and you can do it as often as your resources allow.

An alumni club program (call them whatever you like—chapters, branches, clubs; I use the latter term for consistency) can be the best vehicle you have to engage alumni and help them maintain their ties to the institution. A strong alumni club program can and will help alumni build closer ties. If that is not apparent to your institution, ask members of the administration to read this chapter—carefully!

The term "alumni club" can refer to a variety of groups. These groups may be organized by school, college, or department (Engineering Alumni Club, Psychology Alumni Club, etc.); by special interest (Rugby Alumni Club, Marching Band); by athletic program (Ski Team Alumni Club, Football Letter Winners); by student group (Student Government Alumni Club, Greeks); or by geographic location. Although most of the information in this chapter is relevant to any kind of club, I refer mostly to geographic alumni clubs. These kinds of clubs are key to giving your institution more of an international image and presence.

When successful, alumni clubs can:

- Bring alumni from a particular region together, under the banner (literally and figuratively) of the institution. This structure provides a social opportunity for people to meet, share common experiences, and network.
- Offer a venue and audience for continuing education programs, visits from faculty members and administrators, and athletic events.
- Provide your institution with an international cadre of admissions representatives. The best "salespeople" any school can have are those who went through the program, enjoyed it, and now volunteer to tell others about it.
- Give your institution a national—or, if possible, international—presence. Suppose one of your alumni is a well-known television star who has offered to appear at an alumni club event on the other side of the country from your campus. By promoting the event in the local papers, you can ensure that everyone in that area—alum or not—will see your institution's name and its connection with the famous alum.

I have always been a strong proponent of alumni clubs, and I have made a point to build and support the club program in every institution in which I have worked. The University of Massachusetts Amherst, for example, had four full-time staff members and an annual operating budget of $100,000 dedicated solely to the alumni club program; we managed 75 alumni clubs, including a dozen overseas. Of course, not every institution can commit these kinds of resources. The point is that the level of expectations the school has for the club program cannot exceed the commitment it is willing to make.

THE IDEAL CLUB PROGRAM

What are the expectations, and how do you design your program to achieve these goals? To coincide with the goals of any advancement program, your approach should mirror advancement's mission:

- Engage alumni, parents, and friends (don't limit yourself to alumni and alumnae—parents of current students care a lot about the school) in ways that will allow them to serve as your strongest advocates.
- Enhance the image of the institution.
- Raise much-needed resources to continue moving forward.

University of Massachusetts Amherst Chancellor David Scott liked to use the

acronym "AIR"—advocacy, image, resources—when referring to this approach. With this acronym in mind, when I was at that university, our alumni association set out to develop what we considered to be the ideal club program. This plan can work for institutions of any type or size, regardless of budget. All you need to do is mold and scale the program to fit your needs.

Keeping in mind the AIR acronym, we divided our club programming options into four categories:

1. **Career and life networking.** In a sense, this category encompasses the advocacy segment of AIR. The more we can help our alumni network with each other, and the better we serve them, the more engaged they will become in the life of the institution. They will turn out to be the best advocates you could ever have.

Career and life networking may sound broad, but the bottom line is providing opportunities for alumni to connect with each other and with the institution. Such connection can be accomplished through online directories; permanent, institution-based e-mail addresses; or a business-to-business "yellow pages" that allows alumni to advertise their businesses. Your alumni then have an opportunity to do business first and foremost with their fellow alumni. This strategy serves the alumni well, and the institution undoubtedly will reap benefits by providing the connection.

2. **Image enhancement.** Anything that improves the image of the institution—such as alumni admissions programs, public relations and publicity opportunities, and legislative advocacy outreach—falls in this category.
3. **Resource development.** This term can refer to fund raising for the club or the institution itself. Dues programs, scholarship awards, annual fund solicitations, and prospect screening all help bring in much-needed resources.
4. **Mass gatherings.** At the 1997 Summer Institute of the Council of Alumni Association Executives (CAAE), members agreed on the concept that people in alumni relations will always be in the relationship business. "Mass gatherings" is the term we use to describe events that allow alumni to socialize and develop stronger relations. Social programs, cultural events, and sports-related activities are examples.

As Figures 2-1 and 2-2 show, we first created the four programming areas then we decided on certain levels of club activity (based mostly on the number of alumni in a given area) and divided our clubs into levels, or steps.

The levels ranged from Step 1 to Step 5. Step 1 clubs were those with a minimal

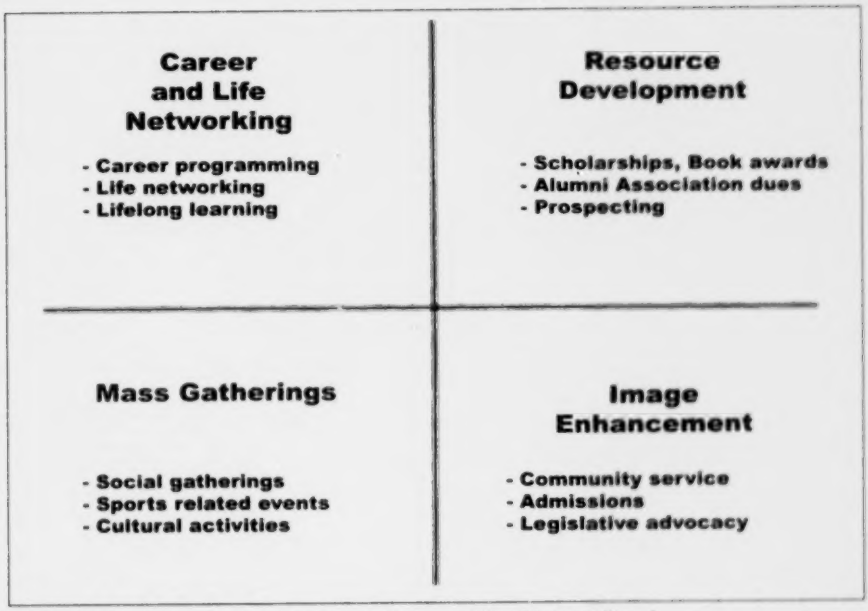

Figure 2-1. Alumni Club Program Areas of the University of Massachusetts Amherst

amount of alumni in a given area (usually fewer than 200.) A club leader or contact person is chosen, usually through self-identification. All we ask of that club is that it host one event each year—anything that will bring alumni in that area together.

Step 5 clubs, on the other hand, usually represent major metropolitan areas in which we have many alumni (normally 500 or more.) These clubs are run by steering committees with as many as 12–15 alumni. We ask these clubs to do at least four events each year (there is no maximum); they must coordinate one activity from each of the four program areas. Anything the club wants to do above and beyond those four events is fine.

The amount of money the UMass Alumni Office spends on clubs is directly proportional to their step level and how well they do in the program. Making the program work benefits everyone.

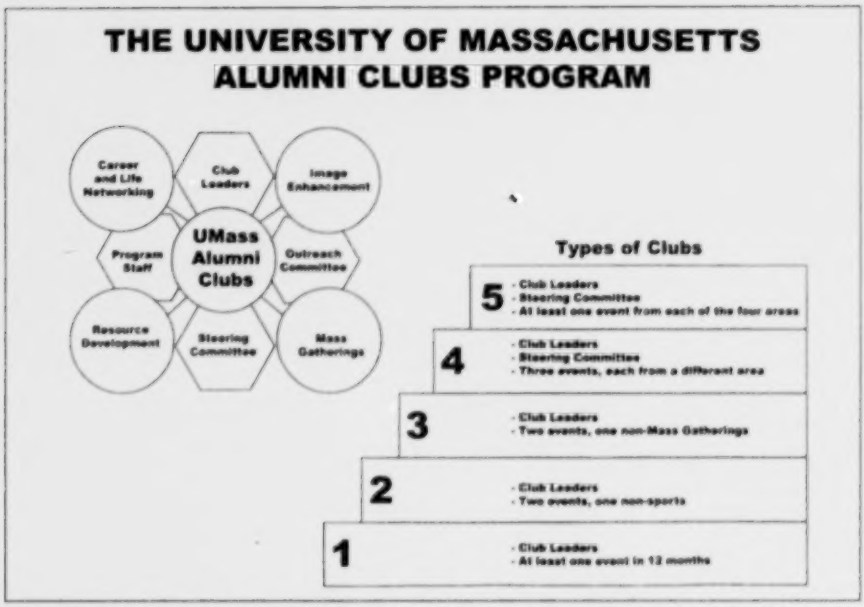

Figure 2-2. Types of Alumni Clubs of the University of Massachusetts Amherst

A SUCCESSFUL CLUB NETWORK

Here's the funny thing about successful alumni clubs: Only you can decide what "success" means to you in the context of a club program. Fortunately, you can control your success based on the resources you commit and your ability to identify, motivate, and train your volunteer leaders. Alumni clubs are only as strong as their staff and alumni leaders. If you make the necessary commitment, you will certainly achieve that success.

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3

ALUMNI RECORDS

Agnes Papke

University of British Columbia Alumni Association

This chapter addresses alumni records in the context of alumni relations. Although databases designed for development share many fields, this chapter treats the topic in relation to the needs of alumni programming and communications.

WHY GOOD RECORDS ARE IMPORTANT

You can do absolutely nothing without an accurate list of your graduates, but even when you have compiled a database, you will never get it all right…ever! The task of updating your records is ongoing and necessary. Keeping good alumni records is essential to building and maintaining relationships with—and providing service to—your alumni. Remember, alumni are products of your institution and the only proof that your institution is doing its job. They must be valued and remembered.

Alumni offices continually update their databases, but estimates of accuracy vary. According to Jan Stuart, senior policy analyst at the University of Australia, 50–80 percent of database entries probably contain correct address information. The implications of a 20–50 percent error rate are serious. The most expensive budget item (excluding salaries and benefits) in most offices is the alumni magazine. Using an inaccurate mailing list wastes significant resources. This principle applies to all mailings: newsletters, event invitations, and others.

HOW TO ACQUIRE AND MAINTAIN RECORDS

Institutions typically download or transfer records from a student database to an alumni database at the time of graduation. Jurisdiction for alumni records may fall to

the school itself or the alumni relations office in particular. Keep in mind that recent graduates often are on the move. They may have used their family home for their permanent address while they attended school, or they may have changed addresses frequently throughout. Unless you make every effort to advise them—repeatedly—about the importance of notifying the records office of their whereabouts, you can easily lose them forever. Opportunities for delivering this message are numerous: Include the message in graduation mailings; hand out a pocket-sized brochure at graduation ceremonies; persuade the registrar's office to collect the permanent family address so parents can be contacted for a new address after graduation. At every event and in every speech, reinforce the message to "stay in touch." Try to make it as easy as possible for alumni to change their database information using online interactive Web sites, fax, e-mail, voice mail, or any other means to facilitate this vital communication.

INFORMATION CRITICAL TO YOUR SUCCESS

In alumni programming, an accurate, accessible database is vital to your operations. Establish lines of communication with the records office to review regularly how records are kept, how tracking is done, and how alumni relations can contribute to the accuracy of the data. Many software options are available for managing membership lists, and many departments at your institution probably will use the list. For cost-effective delivery of alumni programs, products, and services, you will need to segment your database. Flexibility and options for producing lists must be available. (This chapter does not recommend or endorse any particular product; it is important to work with your information technology unit to get the service and support you require.)

Include the following information in your database:

- Name (including former/maiden names, all given names)
- Preferred title (Dr., Mrs., Ms., etc.)
- Year of graduation, and any majors, programs
- Address, including parents or family contact name
- Telephone, fax, e-mail (home and office)
- Spouse/partner's name and any affiliated information (including former name and alma mater, if applicable)
- Place of work and position
- Note on preferred mailing address (business or home)
- Date of last change of information

- Any relatives who are also affiliated (parents, children, etc.)
- Volunteer activity codes
- Student activity codes
- Athletic activity codes
- Attendance at alumni events
- Dues and subscriptions records
- Voting record for alumni board, school boards, other organizations
- Giving record

You can add other information that is particular to your program. Work with your colleagues to develop the most complete list you can.

WORKING WITH YOUR INFORMATION TECHNOLOGY UNIT

In many alumni/advancement offices, the database support managers must please many masters, especially if the information technology department supports development, communications, alumni, the registrar, or others. See to it that your alumni office is represented on any advancement services committees, to be certain the team understands your needs and you understand the issues that affect delivery of the database. Because sharing information is in everyone's best interests, build on each others' efforts in maintaining the database.

PRIVACY

The issue of protecting the privacy of your alumni may be a matter of local legislation. Be certain to contact your institution's legal department to determine how privacy laws apply to your operation. If you are providing access to your Web site for alumni to update their addresses (or other information) and your site is not secure, be certain to point out the level of security you are providing.

RESOURCE SUPPORT

Keeping accurate records can be very labor-intensive. In the future, new technologies may emerge to change and verify information almost instantly. Until that magic appears, however, most data entry is manual (and is an excellent summer student project in alumni records offices). Institutions recognize the value of accurate alumni records, and you can easily demonstrate that support of this function can be extremely

cost-effective. Find a champion in your office to take the request for support to the administration. There are few enough resources for advancement services—none should be wasted.

TRACING ADDRESSES

The ongoing challenge for your records department is keeping addresses current. Several strategies are available. Each time you send out mail, be certain that your postmaster will return undelivered mail to your office, so you can correct your records. If there is no forwarding address available, at least you will save those costs the next time you send a mailing. There may be a fee for this service, so consult with the postmaster ahead of time.

CD-ROM directories to update membership records are now available for purchase. Telecommunications companies typically can provide these products; some are available at office supply retail outlets. The risk in using these products is that they may be six to 18 months out of date. Directories for professionally registered groups also are useful. Again, there may be a charge for them, but they may also be available at public libraries.

Each time you publish your newsletter or magazine, devote a space to lists of lost alumni; this technique always brings in new information. Always provide a faxable/mail-in form in your publications inviting members to inform you of changes to their personal information. Reunions offer another means to improve alumni records. Check obituary notices in the local press and publish the names of deceased alumni to improve reader awareness of the need to keep you informed. (A note of caution: Always confirm the facts. It is easy to confuse alumni who share common names. Publishing erroneous information of this nature can be very embarrassing.)

CONCLUSION

Most important, remember that your success in serving your institution and your alumni depends, to some extent, on the quality and accuracy of your alumni records. Make the human, financial, and technological investments necessary to ensure that success.

4

SUCCESSFUL ALUMNI TRAVEL PROGRAMS

Duncan Beardsley

STANFORD ALUMNI ASSOCIATION

Imagine an alumni travel program that included trips to the world's most exciting travel destinations, the opportunity for fellow alumni to gather and relive old acquaintances, the enjoyment of meeting current faculty and staff members, being a part of special experiences that are unique to your institution. Imagine, too, that the program makes money.

It all sounds too good...Quite possibly it is! As you approach a decision about launching an alumni travel program, you should ask yourself a few basic questions to better understand the business. Understand that this really is a business.

What benefit do you expect from an alumni travel program? There are two major reasons for considering having a travel program: serving your alumni and generating operating resources. Though these goals are not mutually exclusive, you should understand the difference in these objectives when you establish a mission for your program.

Serving alumni suggests a program designed to offer your alumni leisure travel opportunities and provide a place for like-minded alumni to get together and rekindle institutional ties. It could also mean offering continuing education opportunities for your travelers. If you focus on those issues alone, you will make a certain set of decisions when you select your destinations and the operator to run your trips.

On the other hand, attempting to generate revenues by catering to major donors and designing programs that are entirely profit-driven will lead you to make very different decisions in the selection of tour operators and programs. Although generating revenues for your institution is obviously an important goal, planning trips that cater solely to major donors can sometimes alienate other segments of your alumni base.

Fortunately there are very successful programs that can achieve both objectives—but it will take control on your part to do so.

Who will benefit from a travel program? You should consider three potential beneficiaries: your alumni, your association/institution, and the tour operators. Your job will be to ensure that your alumni and association come first. The tour operator has business reasons to serve you, and although the relationship should be "win-win," the tour operator generally considers alumni travel to be just a business; your responsibility is to ensure that your alumni and association are the ultimate winners.

Will your program focus on leisure travel or educational travel? Leisure travel is simple sightseeing and touring, which thousands of travel organizations offer. A golf tour to Hawaii or city sightseeing tours are examples. An educational travel program focuses partly on learning about a destination or the culture of a region. It can be as simple as having the group meet local contacts during the tour; on the other end of the spectrum, it could bring faculty members from your institution, structure lectures into the schedule, and perhaps even offer credit for attending. The more educational elements you take on, the higher the costs you will incur—which will lead to higher costs for the passenger. You will want to evaluate whether the added costs are justified. You will also need to make the trip's focus clear to your alumni travelers.

How will you differentiate your program? Your alumni may be members of a museum or other organization that also offers travel programs. Plan your program in ways that will give you a unique position in the market. Build on your travelers' emotional and social connections to their alma mater.

Do you understand what you are selling? When you offer travel programs, you are selling an intangible; you are "selling dreams." Unlike most goods that one purchases, images of travel come from promotional material and the word of mouth of those who have taken a similar trip. There are no tires to kick or loaves to squeeze. You can help sell your trips by providing your alumni as much information as possible: send them news clippings and weather reports from the destination; direct them to informative Web sites; if the trip has been done before, send them comments from previous travelers. Once you have "sold" the trip on your traveler, success will come from delivering all that the traveler expects...and then some. Your program will succeed if you deliver all that you promise—yet you will be relying on many others to fulfill that promise.

Are you in control? Once you put your name on the program, the reputation of your institution is on the line. As with many things you do for your school, you have a significant responsibility to protect and build that reputation.

Creating a travel program may sound simple, but you will quickly appreciate that many suppliers, agents, guides, managers, and other service providers in the business are doing their jobs in your name. The end product, then, is that you will take the credit—or blame—for what all the others do in your name. Each decision you make in selecting your suppliers has an effect on how your alumni will view your program. When you start a program, you have to be sure that you stay in control of what others do in your name.

PROGRAM OVERVIEW

Here is an overview of an alumni travel program:

- You will select (or be sold) a specific trip: destination, duration, and price.
- You will select a tour operator who will run the program in your name.
- You will generate travelers by furnishing the market and mailing labels for promotion.
- You and/or the operator will handle the many elements of marketing promotion, the booking process, and sales follow-through.
- Staff members from your organization may join the trip.
- The trip departs...
- Special institutional events may take place during the trip.
- The travelers will generate revenue.
- Tour, marketing, and administrative costs will be incurred.
- One or more parties may benefit from a revenue surplus—or you may have negative results and special reasons for subsidizing the program.
- There will be positive and/or negative evaluations.
- Someone will enjoy the credit...or respond to the criticism.

As you can see, you need to understand several issues. You have the opportunity to select a company to make all the decisions for you, or you can be very hands-on and run the program from within your organization. Most likely, you will structure your program so that responsibilities are shared. Take a look at a sample of an outline for a tour date selection from the University of Iowa Alumni Association (Figure 4-1).

TRIP SELECTION

Tour operators will be able to suggest travel ideas, but before contracting with a tour operator, brainstorm about these elements:

- trip destination

Figure 4-1. Sample Outline of Tour Selection Process

The University of Iowa Alumni Association

100 Levitt Center for
University Advancement
Iowa City, Iowa 52242-1797
319/335-3294
FAX 319/335-1070
800/IOWALUM
E-MAIL alumni@uiowa.edu
www.lsr.uiowa.edu/iowalum

General Outline of Tour Date Selection Process and Subsequent Administration of Tour Date

Prior to departure	Action
14 months	Send RFP to tour provider
12 months	Meet with tour provider
10 months	Confirm final selections
9 months	Annual overview ad in *Iowa Alumni Magazine*
9 months	Receive preliminary sheets from tour company
9 months	Send prelim to Travel Insurance Services
9 months	Update WWW listings
8 months	Request brochure blueline
8 months	Request mailing label email file to tour company
8 months	Proof blueline
6 months	Receive brochures from company
6 months	Mail 2 brochures to Travel Insurance Services
5 months	Invite tour host(s)
5 months	Educational packet from host
4 months	Meet with host to review duties
3 months	Introduction letter from host goes out
2 months	Pre-trip study packet out to passengers
1 month	Supply box to host

After return	Action
2 weeks	Misc. post-trip details
4 weeks	Trip evaluation & expense report from host
4 weeks	Reimburse host
6 weeks	Receive commission

General Outline of individual reservation processing (as they are received)

- Fax and reservation to travel coordinators (e.g., AHI, Intrav, Gohagan, etc.)
- Mail confirmation letter along with travel insurance packet to passenger within 24 hours of receipt of their reservation.
- Record name on list for that trip.
- Record number on booking count.
- Update passenger's record in the mainframe with trip data; Add data to MS Word files.
- One month prior to final payment due date, send passengers another set of insurance materials–just in case.
- Two weeks prior to departure, send passenger a bon voyage letter along with travel bag, diary, list of passengers on trip and Iowa stickers for identification en route.
- One week after return, mail passenger a thank you letter along with a SAE and evaluation form.

your gateway to the world

Courtesy of University of Iowa Alumni Association

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- activities/lectures/theme
- length of trip
- retail price of the trip

Understand your market: Who will take the trip?

In order to make these decisions, you will need to consider which of your alumni are likely to buy and take the trip. Who is your market?

To understand your market, remember that some people view group travel negatively; others regard it positively. Younger alumni (ages 20–40) generally do not consider themselves to be in the group travel market because they believe they can do it themselves.

Older alumni (ages 50–70), on the other hand, are more likely to want the advantages of group travel. They appreciate having many decisions made for them—particularly in countries where language, culture, and food are foreign. They are willing to pay a premium to be pampered. Many travelers in this market feel that after their children leave the household they deserve to spend some of their disposable income on themselves. As a rule, alumni travel generally appeals to "empty nesters" in the 45–70 age bracket.

The converse of these travel marketing axioms is the challenge of planning programs for young alumni. This subject deserves a book in itself, however; this chapter is devoted to starting a travel program and concentrates on "fishing where the fish are."

Selection of a tour operator

At the same time you are considering the choice of trip and your audience, you will have to select an organization to run the program—keeping in mind that whoever you select to run the program does it in your name. Therefore, you have a special task in selecting an operator that will represent you well and one with whom you have mutual respect.

In selecting a tour operator, you will want to consider the following questions:

- Does the tour operator have experience planning and running travel programs?
- Has the tour operator worked with alumni or other nonprofit organizations?
- Does the tour operator have experience marketing travel programs?
- Is the tour operator financially sound?
- What insurance does the tour operator provide?

- Will the tour operator name your organization in its insurance policy?
- How does the tour operator handle unexpected situations?
- Does the tour operator have positive references?

You also can compare operators with regard to the services they offer you and your travelers:

- Rate of deposit required
- Times at which payments are required
- Administration cancellation penalties
- Do they accept credit cards? Which ones?

The sales manager for the operator may not readily answer some of these questions. Alumni travel managers generally are very open and noncompetitive, however, so you can ask other associations about their experiences with different operators. You also can attend CASE conferences or the Non-Profits in Travel Conference (usually held the first weekend in March in Washington, DC), during which you can exchange ideas with many others in the business.

A final consideration to discuss with an operator may be the need to consider sharing your program with other institutions or with the general public. Making sure that all travelers are from like-minded schools is a good way to ensure that the makeup of the group is positive. Traveling with a random mix of passengers creates unease.

GENERATING THE MARKET IS IN YOUR CONTROL...AND IS YOUR RESPONSIBILITY

The operator may prepare the brochure, put your name on it, and do the mailing, but you control the mailing list or magazine circulation of the alumni that are your market. You own that list, and you should manage the selection of the names to receive the mailings. Do not indiscriminately hand over your list! When you do, be sure that it is not used for any other purpose; get that promise in writing.

You may have to make decisions if any special pricing is to be offered to your alumni or members of your association. You may elect to charge a premium to nonmembers, thereby favoring your alumni. (Alumni who are not members of our alumni association must first pay $50 to join the association for one year.)

Tour operators have policies relating to amount of deposit, schedule and amount of further payments, and cancellation fees. As you discuss programs with various operators or read other schools' brochures, you will appreciate the many variables; you may eventually wish to set your own policies in this area.

Either you or the operator (or both) can service the demand created by the

promotion. Here are some of the responsibilities involved, and some pros and cons of handling them directly at your institution.

- Designing the brochure: This material sets the image of your trip—and how your alumni perceive you. Producing a custom brochure is costly, however.
- Accepting an initial reservation/deposit: Direct payment establishes a quality link to your institution.
- Handling follow-up booking process: Although this process is time consuming and requires detailed knowledge of the trip, it further builds the relationship between you and your alumni.
- Preparing and sending final billing, tickets, and documentation: Being involved with these final steps solidifies in the minds of your alumni that you are running the program. Letting the operator do it saves money and time, but you must trust that the operator truly represents you.

The trip departs

The operator will handle most of the decisions concerning how the trip operates. If you have been prudent in selecting the operator, you will be pleased with the operation.

The travelers will return home and (you hope) provide positive feedback. Be proactive in collecting evaluations and handling them in a positive manner.

Finally, assess the costs you incurred and the benefits you gained. If the results are good, you will run another trip. If the operator is pleased with the results, it will want to run another program with your organization. If things don't work out with the operator for any reason, simply select a different operator for next time, keeping in mind what didn't work out with the first operator.

What sort of staff should you send on your program?

You should send someone—if for no other reason than to hold the hands of your alumni, so they know that you appreciate their going on your trip. More important, if you don't send someone, the tour operator will staff the trip and handle all issues in the name of your institution.

Consider the following roles for individuals who might represent your organization:

Host: This person represents your association or institution and provides a common link for the travelers. He or she welcomes the group at the first gathering and speaks about the relationship of your program to the association. Some institutions

send senior administration representatives; others send association staff members. This person also can function as the tour manager—but should not be thrust into that role unless he or she fully understands the responsibilities that go with it.

Tour Manager: This person has many duties: communicating on behalf of the travelers with the tour operator's representatives on the trip and handling mundane details during the program—such as counting the baggage, arranging for lost baggage to be traced and reclaimed as quickly as possible, and looking out for single or first-time travelers who may need special help. A tour manager should always expect the unexpected and handle emergencies as if there were a manual for each unique situation. Unfortunately, there is no such manual. The operator can handle the tour manager function—but, again, the trip is in your name, so the individual who does this job must truly think and react as you would want.

Faculty: Generally this person is expected to provide an academic component during the program, be a significant educational resource on the area you are visiting, and provide some explanation of the current events and sights that are included. Faculty members can host tables with alumni at dinner and discuss your institution today versus when the alumni were there. Faculty members often have expertise to lead rather than just follow along on certain tours. A faculty member can be your host, but should not be expected to be a tour manager.

Financial Considerations

When you agree to run the program, the operator generally will propose a retail selling price and offer a commission or rebate for your organization. There is no one set way to do this. Some operators pay a percentage commission based on total sales. Others pay a fixed dollar amount per traveler. No matter how it is done, you can calculate what return you will enjoy for running the program. A typical commission is 5–7 percent of the tour price, though some commissions may be less. For most institutions, the travel program does not generate significant revenues until the association has developed a long tradition of successful travel programs.

If you are responsible for producing the brochure, paying the postage and mailing house costs, or doing some portion of the reservations process, you should negotiate a greater return of revenue. As someone who is new to operating a travel program, you may not want to take on the preparation of the marketing materials. Save that task until you have run a few trips and have learned what works with the brochures offered by the operators.

If you let the operator use your list and send the brochures, you may think that

all of the revenue is pure profit. You need to consider other inevitable costs, however:

- Office staff to handle questions raised by alumni. More staff time may be involved, depending on your involvement in the booking, billing, and documentation process.
- Risk management, which includes offering travel insurance to travelers as well as assuring that the operator carries liability insurance and includes your association in that coverage. After reviewing the operator's policy with your legal counsel, you may elect to carry your own additional liability coverage to further protect your association.
- Basic overhead costs associated with having even part-time staff assigned to your program.
- Finally, after considering the aforementioned costs, if you generate a net profit, you should review the possibility that you are subject to Unrelated Business Income Tax (UBIT).

Getting started

Negotiating with tour operators is the best way to get your feet wet. Your first meeting will expose you to many factors involved in the selection of a trip, as well as the many marketing functions that take place before the program operates. You will learn what one operator thinks and what that operator is prepared to do to make the program a success.

Not all operators are alike. Not all operators offer the same marketing assistance; not all operators deliver the same product. Listen and look for what they tell you—and, more important, what they don't tell you. Seek multiple presentations, even though doing so is time-consuming.

Understand costing issues

Tour operators have to watch their bottom line. Most trips result in small profit margins for them. Your institution's compensation, the number of "comps," and the number of brochures you ask the operator to mail all influence real costs for the operator.

Understand your responsibilities to the operator

To ensure that your travel program is a "win-win" relationship, you should understand how tour operators regard you and your program. They want a successful program,

too. Success to tour operators, however, is tied to the number of paying travelers. They view success by the financial bottom line.

An operator may agree to do a mailing to your entire list of alumni, but such an approach may not be in your best interest. True, you will expand your reach simply by virtue of the fact that so many of your alumni get to see that you have a program. When you and the operator review the results of other marketers with like audiences, however, you may discover that you are wasting a lot of money communicating with unlikely candidates. You may not be able to control your lists now. As your program grows, however, you need to learn to manage your lists so that you mail to those most likely to book.

It may surprise you to discover that for many operators, an average mailing of 10,000 brochures may produce only 10 travelers. (That amounts to only 0.1 percent.) As postage, production, and mailing costs increase, operators are increasingly critical of the lack of productivity of many lists and are not interested in continuing to do mailings for some institutions. Therefore, you should track the results of mailings that use your lists and seek ways to identify groups of alumni who are more likely to book. The more you cooperate with the operator to ensure that the operator has the best chance to generate sales from your mailings, the more likely it is that the operator will create great programs for your institution.

Consider ways to segment your list

To increase the response rates of your mailing, consider these hints:

- Alumni who have made donations to your school or are members of your association obviously are committed to your institution and therefore are better prospects.
- Travel marketing research statistics indicate which age groups are most likely to take a particular program. Selecting only those class years to receive a particular mailing will increase the response rate and put you in a better light with your operator.
- Many operators will assist you in managing your lists and help you create more productive segments for future mailings. It is to the operator's advantage to offer this marketing service because it lowers the cost per traveler.

A FINAL THOUGHT

Not everything will go perfectly as planned, and the travelers don't have another chance to relive the experience. When a problem arises, you are the one who has to listen and follow up. It is important that you be fully prepared to handle these difficult situations. You should not assume that the tour operator thinks as you do and will handle the situation as you would.

Therefore, if the trip has problems and the customer is due compensation, be prepared to handle it yourself. Yes, have a budget for these unexpected situations.

5

BOARD AND VOLUNTEER MANAGEMENT

Gabrielle Korn

Concordia University

If *Time* magazine were to dedicate a cover issue to a trend instead of a person, "change" would be the hands-down winner as the embodiment of the 1990s. This past decade has been characterized by unprecedented changes in the workplace, the family, the environment, and the world map.

Global competition and, in some instances, greed have caused many people to move out of traditional career paths—sometimes into more enjoyable and prosperous entrepreneurial endeavors. The nuclear family has been all but replaced by the merged household in which partners reside together (often with children from previous unions). Mild, snow-free winters in the North and freezing rain in the South have all of us thinking about the environment with even greater concern than the damaging effects of solar radiation on the skin. Strife around the world, which most of us can watch from our living rooms, has also brought a new spin to our understanding of the global village.

The job of the alumni relations professional has not gone untouched by this wave of change. Alumni relations professionals of yesterday—characterized as people mobilizers and superior event organizers—served a population of alumni who, by and large, shared similar values. Back then, alumni would eagerly return to campus to socialize with former classmates, serve for a number of years as a board or committee member, and even answer the call of the annual fund solicitation.

The vocabulary of the alumni relations professional today includes "cost-benefit analysis," "customer-driven," "market research," "database segmentation," and "push technology." In other words, the people business of alumni relations is today equal parts people and business.

These changes are good news and not-so-good news for alumni relations professionals tackling the issue of board and volunteer management. The good news is that people, happily, are still people. The traditional who, what, why, where, and when of board and volunteer management requires only slight regeneration as we enter the new millennium. Pinning down the how of board and volunteer management, however, is the challenge of the future.

This chapter provides the elements of board and volunteer management in the context of changing conditions. The analysis is based on the changing face of voluntarism as a result of forecast demographic and societal shifts in years to come.

THE ROLE OF ALUMNI ASSOCIATIONS

Although we can differentiate our institutions by geographic location, culture, values, programs, areas of expertise, and research, alumni associations are similar in their mission of advancing the goals of the institutions they serve.

Service to education is a noble cause indeed. It used to be the privilege of the few, who would ask themselves what they could do for their alma mater. Higher education today is increasingly necessary to advance in society. The preponderance of vocationally oriented degrees and the flourishing of corporate partnerships attest to this shift. Although service to education remains meritorious, it has become reciprocal: The institution must be able to provide a tangible return on a volunteer's investment of time.

Alumni associations need volunteers to recruit and mentor students, raise funds, advocate for the institution, and provide service to one another and to the community. In return, alumni want a voice in decision making. They want to offer suggestions on curriculum design and management methods based on their post-graduation life experiences. They want to acquire necessary skills and meet key people. Alumni still want to enjoy themselves as they serve our institutions, and they still expect our gratitude for their contributions of opinion, time, and money.

IDENTIFYING, CULTIVATING, AND RECRUITING VOLUNTEERS

Alumni relations professionals will be relieved to hear that many of the tried-and-true avenues of volunteer identification remain valid today. We continue to meet alumni face-to-face at on- and off-campus events; now, we also "meet" alumni via electronic communication. We seek referrals from current and past alumni leaders, development

Figure 5-1. Board of Governors Position Description—University of Chicago Alumni Association

UNIVERSITY OF CHICAGO ALUMNI ASSOCIATION
BOARD OF GOVERNORS

POSITION DESCRIPTION

A member of the Board of Governors is elected to hold the position based on demonstrated involvement, support and commitment to the University of Chicago. In accepting the two-year appointment, an individual agrees to fulfill the responsibilities associated with Board membership. These include, but are not limited to:

- Attending and participating in all scheduled Board meetings. These are held two times each year (in fall and spring).
- Serving actively on Board committees and task forces as assigned.
- Becoming a representative and spokesperson in your community for the University of Chicago and the Alumni Association. This should involve attending local club activities, talking to prospective students, meeting with other alumni or with representatives of the University traveling to your area, and more.
- Seeking out and encouraging talented alumni for the Board of Governors, other alumni activities, and alumni awards.
- Being familiar with the programs and activities sponsored, organized, and coordinated by the Alumni Association and participating in them to the extent possible, including major campus events.
- Contributing financially to the University each year. All Board members are expected to be current donors at the highest level possible.
- Offering ideas to help make the Board of Governors and the Alumni Association more meaningful to the alumni consituency and initiating Board activities and projects.
- Being an ambassador, publicist, and advocate of the Alumni Association and of the University of Chicago.

10/97

Courtesy of University of Chicago Alumni Association

Figure 5-2. Position Description for Member—UMass Amherst Alumni Board of Directors

POSITION DESCRIPTION
MEMBER-UMASS ALUMNI BOARD OF DIRECTORS

A member of the Alumni Board of Directors is nominated to hold this position based on demonstrated involvement, support and commitment to the University of Massachusetts and the Alumni Association. In accepting the appointment, and individual agrees to fulfill the requirements and meeting the following responsibilities associated with Board membership. Board members shall:

1. Attend at least three of the four full Board meetings each year.
2. Attend and participate in all training and orientation meetings. A schedule of full Board meetings is included in the Board Handbook.
3. Serve actively on at least one Alumni Association committee, participating in at least two-thirds of the committees meetings each year. Some committee meetings are held in conjunction with the Board meeting, but are also held at other times during the year. Meetings may also take place via teleconference or video conferencing.
4. Attend Alumni Weekend and the Annual Assembly of the Association, unless there are extenuating circumstances.
5. Attend at least two of the following events:
   - William F. Field Alumni Scholars Luncheon
   - Senior Awards Luncheon
   - Annual Tribute to UMass Basketball
   - Distinguished Alumni Awards Ceremony
6. Attempt to participate in other activities supported or sponsored by the Association, including:
   - Ambassadors receptions
   - Yield Receptions and Send-off Parties for new students
   - UMass Alumni Cup and other athletic events
   - On-campus special events
   - Alumni club activities
7. Actively recruit members to the Association.
8. Become a representative and spokesperson in your community for the University of Massachusetts and the Alumni Association. This could involve talking with prospective students, meeting with other alumni, communicating with area legislators, attending local alumni club events, and more. They should also help identify potential new Board members, who can serve as their successors at the end of their term.
9. Assist the university and Alumni Association in identifying, cultivating, and involving alumni in areas such as student recruitment, job placement, legislative advocacy, club leadership, and financial support.
10. Be current donors to the University (at any level) and each member must be a current dues-paying member of the Association.

Serving on the UMass Alumni Board of Directors is a prestigious role, and one that is greatly appreciated by the University. But it comes with an awesome responsibility. If you cannot fulfill the Board member's role (as outlined above), we'll be happy to help identify a UMass volunteer role that is more appropriate for you.

If you are eager to assume these responsibilities, thank you in advance for your commitment to UMass. Oh, one more thing...help us find more people like you!

Courtesy of the University of Massachusetts Amherst Alumni Association

BEST COPY AVAILABLE

colleagues, campus contacts such as trustees or political figures, and members of the faculty and staff. We look to the parents of current students, as well as to chapter and other constituency leaders.

Alumni boards usually engage a nominating committee in the process of recruitment. Alumni relations professionals must ensure that membership on the nominating committee is as diverse as the membership from which new directors are being drawn. Criteria for the selection of board members generally are based on a candidate's past performance, which is often the most reliable indicator of future performance.

Consider a candidate's willingness to commit time to board assignments; capacity to provide meaningful, as opposed to titular, leadership; willingness to bring careful thought and consideration to issues arising at board meetings (and constructive participation therein); and ability to negotiate and compromise. Sample position descriptions for board members are shown in Figures 5-1 and 5-2.

Challenges in the cultivation and recruitment process remain because we are competing against demographic and societal changes. Our potential volunteers are battling economic pressures, unending demands on their time, distance commitments, cultural barriers, and even competing benevolent causes. We need to ensure that we are offering our volunteers meaningful and challenging assignments that will allow them to contribute their expertise. We also need to be perfectly clear about the total time commitment we expect of our volunteers and, equally important, the financial commitment that comes with their role.

Thus, although lunch with the president of the institution may entice some volunteers to join the ranks of an alumni organization (and should not be entirely discounted), most alumni today will weigh the cost-benefit relationship of their involvement. Successful alumni relations professionals must be able to demonstrate to potential volunteers that their affiliation with the organization will contribute to their success in life: the proverbial "win-win" scenario.

When you are looking for volunteers, remember to extend your reach to your entire membership. Failure to invite representatives of all campus groups deprives your association of diverse ways of thinking about everything you do for and offer to your members. There is no advantage in dispossessing any segment of our constituency. You need to know, therefore, who constitutes your membership and ensure that your recruits have roots in those populations.

VOLUNTEER LEARNING OPPORTUNITIES

Once alumni agree to serve the association in a voluntary capacity, make sure that their experience is productive and positive. Start your volunteers off on the right foot by providing them with the tools they need to carry out their duties successfully.

An orientation session is best done in person. If your new volunteer cannot attend a scheduled orientation session, take the orientation to the volunteer. The agenda should include a discussion of the duties of the board member or volunteer, a review of the mission of the association and how it is organized, and background information about the institution.

The best learning environment for adults is one in which an exchange of experiences and points of view takes place. Very few adults believe they need to be "trained" to do anything, but they do appreciate learning opportunities that enhance their performance. Learning should be participatory. Rather than assuming that the volunteer will be committed to take part, ensure that everyone has a chance to speak and address important problems. Solicit feedback on important issues and methods to improve participation.

Orientations and learning workshops need to convey the fundamental message to alumni volunteers that they are uniquely positioned to create a future for their associations. The mandate of the association board, in particular, is to develop a strategic plan to consider future opportunities and threats to the association—and how to react to them. Maintaining a focus on the big picture is an association's biggest challenge; alumni leaders clearly must think ahead. Therefore, you should include a definition of the roles of the volunteers and staff in your orientation sessions.

THE VOLUNTEER–STAFF PARTNERSHIP

The ideal association organization involves partnership management, whereby volunteers and staff members are recognized and appreciated for their respective areas of expertise and responsibility. Partnership management avoids conflicts between staff members and volunteers and situations in which the staff makes all the decisions on behalf of the board and volunteers meddle in the day-to-day operation of the association.

In an ideal partnership, volunteers adopt the NIFO principle: Nose In, Fingers Out. In other words, volunteers are responsible for strategic thinking, and the staff is responsible for strategic implementation. The board must define the association's

mission and establish the long- and short-term goals that will achieve that mission. The board should adopt governing policies and approve budgets. The staff needs to translate the goals into practical action plans with the programs necessary to carry them out.

As in all good partnerships, however, volunteers and staff members should share in the goal-setting and planning process. Just as alumni relations professionals must recognize the areas of expertise volunteers bring to the table, volunteers must recognize staff expertise in association management. If staff members strive for good working relationships with volunteers, volunteers' positive experiences serving the institution can only increase the productivity of the association.

VOLUNTEER RECOGNITION

Alumni agree to serve their associations for many reasons. Altruism is not dead. Time-deprived as alumni are, they can be motivated to serve a charitable organization if it has meaning to them and they feel their talents will be well served. They might be inclined to join an organization if they think they will learn from the experience or from someone involved in the organization. They may even join an organization if they think it will give them prestige or help advance their careers.

Whatever the motivation, the challenge for alumni relations professionals is to keep volunteers motivated. Volunteers will remain with your association as long as they have the opportunities to make meaningful contributions—and as long as they enjoy themselves while doing so.

Recognizing the efforts and successes of volunteers is just one incentive for their continued participation. Although such recognition may come in a variety of forms, it is often underutilized or underestimated. Recognition can be as simple as a handwritten thank-you note or as grand-scaled as a full-fledged awards banquet.

Other recognition ideas include the following:

- Publish an honor roll of board members in your alumni publication and on your Web page.
- Keep a diary of each volunteer's accomplishments that you can present when the volunteer retires from service.
- Include a description of a volunteer's major achievements in your campus or alumni publication, and on your Web page.
- Make coming to campus for meetings easy for your volunteers by being considerate of everyone's schedule and by providing parking and meals when appropriate.

- Recognize volunteers at your association's events.
- Write letters of commendation to your volunteers' employers, thanking them for their support of your volunteers' service to the community.
- Recognize your volunteers' personal accomplishments (such as promotions or other awards received).
- Offer token gifts, such as association merchandise, for a job well done.

CONCLUSION

The measure of a productive, responsive alumni association of the future depends a great deal on appropriate recruitment and resourceful involvement of volunteers in a vibrant, strategic-thinking organization in which alumni relations professionals provide the necessary tools essential to the success of this volunteer core.

Our constituents have less time for committee meetings and governance in general and feel a greater sense of accomplishment when they can resolve specific issues. Keep in mind, however, that volunteers are ultimately responsible for strategic thinking, and the staff is responsible for implementation.

Volunteers and staff members together need to monitor emerging trends so the organization can respond appropriately. Our associations can remain dynamic if we focus on identifying and meeting member needs and keeping lines of communication open. Uncertainty about the future remains a reality. Yet an association that stays in tune with its members and abreast of trends is more likely to make better strategic decisions.

6

ALUMNI CAREER SERVICES

Leonard M. Contardo, Jr.

Georgia Tech Alumni Association

Young alumni are at the genesis of loyalty to their alma mater, and alumni career services can deepen that loyalty as alumni are led through the dynamic career process.

Consider Georgia P. Burdell, an alumna from the class of 1997. After investing five years at her university, she is relieved, euphoric, and overwhelmed. She accepts a job and begins her professional journey; the institution that fostered her educational development seems to fade as a viable resource for continued career growth. The window connecting this alumna with her alma mater is closing—yet alumni career services can support her throughout her career.

Early in her career, Ms. Burdell decides to reexamine her first job acceptance by participating in some assessment testing. After three years, she "tests the waters" to determine the market value of her skills. She reads a job bulletin to learn about various career opportunities in her industry. Georgia realizes that her experiences are undervalued in her current company, and she decides to renegotiate her salary. Because she has never actively participated in a salary negotiation, she attends a workshop to prepare for the discussion. A decade later, Georgia chooses to move back to her hometown to care for her aging parents. She makes use of a career fair and a networking group to find a new job. Close to retirement age, Georgia feels as though her professional experiences have been valuable and interesting enough for her to serve as a mentor to young alumni and students. Her career has come full circle—and her alumni career services department was with her every step of the way.

Alumnae such as Georgia may travel one of two paths. One path—the one Georgia chose—involves full use of alumni career services to achieve professional goals.

On this path, alumni career services offers assessment testing through a joint agreement with the campus counseling center. The jobs bulletin appears on the Web and is updated on a daily basis with the latest opportunities. The career services staff offers quarterly career workshops covering topics such as resume revisions, interviewing skills, salary negotiations, networking for beginners, and so forth. Alumni career services and a local university cosponsor an annual career fair. A women's networking group serves as a resource for dealing with the unique challenges facing women in the corporate world. Alumni career services has a mentoring program for any alum who wishes to assist other alumni in their careers.

On the second path, an alum like Georgia seeks advice in salary negotiations from a friend who may not have the expertise of a career development professional. She enrolls at a local college for job search workshops as a easy alternative to an alumni association program. Many community groups offer networking opportunities for the alumna and their membership. Web pages, search firms, and staffing agencies offer her job opportunities and career fairs—sometimes with a fee and rarely with the best interest of the candidate in mind. Resumes can be posted on hundreds of Web sites with the hope of matching a company's key words and criteria.

The second path is chock full of organizations and companies who wish to assist the alumna in her search. The distinct advantage of alumni career services is the opportunity to assist alums as a matter of principle. The alumni association exists to perpetuate the institution it represents. An effective way to accomplish this goal is to serve as a support mechanism throughout alumni careers. This purpose is quite different from placing a person in a job for the sole purpose of collecting a fee.

WHAT DOES ALUMNI CAREER SERVICES DO?

Alumni career services evolved from the alumni placement model. Alumni placement has existed in one form or another since alumni began to organize and share their experiences. Alumni association staff often served as intermediaries between hiring companies and alumni searching for new jobs. This service developed into an alumni placement program. Alumni placement staff assisted alumni with their career by matching their skills to a company's needs. Alumni placement was employer-centered by virtue of work philosophy (go where the job is), a weaker economy (domestic, manufacturing-oriented), and less technology (limited ways to market skills to employer).

The environment has changed. Over the past five to seven years, alumni career

services has transformed into a proactive, innovative, and crucial program for alumni. Today, most career services programs are candidate-centered, offering alumni a wide array of career options that are not limited to a particular field, industry, or location. Job candidates want greater flexibility to deal with professional and personal challenges such as professional growth opportunities, geographic preferences, family issues, commuting difficulties, the need for frequent training, and so forth.

The essential function of alumni career services is as a "friend-raising" tool, developing a connection between alumni and their alma mater. Many significant relationships between alumni and their university begin through alumni career services programs such as jobs bulletins, career fairs, networking groups, or workshops. Alumni who have used these services also are excellent resources for alumni committees, advisory boards, annual giving support, and even employment leads.

ELEMENTS OF A SUCCESSFUL ALUMNI CAREER SERVICES PROGRAM

Successful alumni career services offer customized programs. Effective alumni career services departments are not simply extensions of existing student career services but a unique collection of services and programs designed specifically for alumni. A new alum looking for an entry-level job, like a new automobile, requires little maintenance. An experienced alum, like a used car, needs greater care and offers a unique set of challenges. Just as major systems in a used car may need to be revamped or updated to fit changing environmental and safety standards, experienced alumni offer a unique set of circumstances throughout their career—family matters, training needs, career direction, and issues of job satisfaction.

Effective alumni career services also incorporate a technology focus. Use your Web site and e-mail to promote the program, communicate changes in services, and allow for online registrations and tracking of alumni participating in the program. Offer advisement and assistance via e-mail for alumni who cannot easily visit campus. Effective alumni career services Web sites have the following components in common:

- They are customized, offering unique programs for the alumni constituency;
- They are regularly updated, creating an incentive for alumni to visit the site frequently;
- They are easy to use, with simple layout and navigation.

PROGRAM AREAS

Alumni career services can be divided into three program areas:

Employment Opportunities

- Jobs bulletin—Offering jobs for alumni via mail, Web site, or e-mail; updated at least on a weekly basis. Alumni need delivery options with jobs bulletins because not all have access to or are comfortable with the Web/e-mail.
- Career conference or career fair—Opportunities for alumni to meet corporate recruiters and schedule on-site interviews.
- Open resume file—Allows companies to search for alumni candidates by degree, field, or years of experience (available on paper or via Web site).

Career Advisement

- Workshops and seminars—Covering a variety of topics, including resume preparation/revision, interviewing skills, networking basics, job searching on the Internet, salary negotiations, and how to look for a job while still employed.
- Advisement—One-on-one and group sessions to help alumni develop career strategies.
- Assessment testing—Performed by licensed professionals to assist alumni in setting goals.

Mentoring/Networking

- Alumni career network—A formal program to connect alumni who are looking for career support (e.g., moving to a new city, transitions from corporate to not-for-profit environments).
- Mentor program—Matching alumni with each other or pairing an alum with a student to serve as a resource throughout the student's future career.

FACTORS TO CONSIDER IN STARTING OR REDESIGNING AN ALUMNI CAREER PROGRAM

When you create or redesign an alumni career services program, consider the following factors to ensure a successful beginning:

Staff

Determine your needs on the basis of the scope of services you offer. One office may use a certified career counselor for assessment testing, whereas another office may choose to offer that service on a limited basis through the institution's counseling center. Two staff members can handle a basic collection of services (divided into programmatic and administrative areas) for alumni. You can offer additional programs via outsourcing or by utilizing other campus resources.

Location

Many alumni career services' offices are close to student career services. That arrangement allows for a seamless transition from student to alum. Some alumni associations house career services departments in the alumni house to establish that connection. That arrangement makes it easier for alumni who already have a relationship with the alumni association.

Funding

Alumni association support is critical to the success of a program. After investing resources and staff, you will need a minimum of three years to develop relationships with companies and alumni and to assess success. You can generate significant revenue by charging companies for the privilege of connecting with alumni, and you can realize cost savings through electronic program offerings.

Relationship-building

The key to all of alumni relations and alumni career services is to build a strong, lifelong relationship between the alum and the institution. When alumni understand the significant investment you are making in their lives, they will reciprocate with support of the program. This support will translate into increased participation in the annual fund and alumni association events and programs. Successful alumni career services programs have a constant stream of alumni promoting the services to businesses and alumni. (Beware of duplicating other campus and community services, however.)

Marketing

There are two distinct constituencies to which you can market the benefits of an alumni career services program: alumni and businesses. Alumni may participate in the process by serving as volunteers for a career network or mentoring program; receiving

the jobs bulletin; attending the career conference, career fair, or workshops; or visiting the Web site and using the resources on the page. Corporations are eager to recruit with alumni career services because it is a cost-effective way to target a unique set of qualified individuals with the same educational background. Businesses use the jobs bulletin, career conference/career fair, and open resume file and can help sponsor workshops or programs.

Strategic Plan

You need a clearly defined vision, mission, and objectives. In the midst of the program cycle, a feedback component challenges alumni career services staff members to assess and revise organizational objectives frequently. Market research is a crucial element in determining when the department is following an effective strategic plan. Because of the fast pace of change in the technology sector, career services must reevaluate its programs and services on a biannual basis to ensure that it continues to offer effective services. Evaluate your objectives every six months to keep the department on track. Program growth will be effective only if you maintain specific quality standards (e.g., replying to alumni e-mail within two days, providing resume critiques in three days).

Tracking

Alumni friend-raising builds financial support for the institution. Career services programs are essential to the friend-raising equation. Unambiguous, quantifiable data also are an excellent source of information to gauge the effectiveness of the program. Develop and use simple methods to allow staff members to quickly capture key data about the alumni they are serving. Communicate this information to the alumni records department for biographical updates and development cultivation.

Technology

We live in a world of electronic everything. The Internet, World Wide Web, newsgroups, e-mail, and countless other technologies require that alumni career services make a serious commitment in this area. Career services historically were offered only to alumni who could visit the office for assistance. Now, with the improved reliability of communications (particularly e-mail and fax), it is realistic and expected for departments to serve alumni throughout the world. Technology provides an excellent opportunity to connect with many constituents who may have never participated in alumni association programs.

CONCLUSION

Alumni career services is positioned to connect with alumni in an immediate, life-changing manner. All programs—existing and new—should be well defined and strategically focused to achieve the goal of promoting the university and the alumni association. Connecting with alumni is a constant challenge calling for high-impact, low-cost, quality services. Few services offered by an alumni association provide such significant, practical value as career support and guidance.

7

ALUMNI COMMUNITY SERVICE PROGRAMS

Beginning or Bettering Your Alumni Association's Community Service Program

Ed Trifone

University of Notre Dame

Developing a volunteer program is a lot like growing a garden. Just about anybody can do it, and it doesn't take much experience—just a little hard work. You begin with seeds someone else has developed, you start small, and then you let it grow and grow!

Our job as alumni professionals is to cultivate our constituents' relationship to our institutions; we accomplish this task by developing and delivering an array of programs. Although you and your alumni may not all have green thumbs, most of your active members do have some kind of volunteer experience. After all, our most popular alumni club social events generally succeed because of the work of many people—usually volunteers—who together function as local representatives of our institutions. Of course, the difference between a community service project and a club social is that in the former case, our alumni are volunteering while publicly representing our schools. Thus, their efforts—good or (rarely) bad—in community betterment carry the mark of our institutions.

DEVELOPING THE PROGRAM

Helping to develop local alumni service projects has become a main focus of our jobs. In doing so, our guiding efforts become a reflection not only of our institutions but of ourselves.

To begin our work out in the fields, we must pick charitable organizations with which we want to grow. To make a good match, we must have a real sense of the mission and objectives of the nonprofit groups we are considering. By finding compatible groups, we can build lasting, symbiotic relationships. In addition, we can discover the agencies' needs—as well as how the alumni association may be able to meet them.

Extending your programming throughout your association to include service projects may seem to be an insurmountable task—but not if you have a plan. Start at the top by asking your president, in conjunction with your governing body, to declare your institution's full-fledged commitment by proclaiming a Humanitarian Week or Community Service Week. During that designated week, let your alumni know that they will be expected to take part in a service project with any of the groups you have identified. The designated week can mark the kickoff to your overall community service program. In choosing the dates, include both weekends to allow for flexibility. Consider the early fall; it marks the beginning of the school year, when club activities generally are most successful. Encourage each club to identify a dedicated individual who is willing to take on the role of community service coordinator; the success of your efforts depends on this group of soon-to-be trendsetters. It is crucial for you to display your utmost enthusiasm and encouragement to these coordinators while you personally explain the process of acquiring, appreciating, recognizing, and retaining the volunteers who will make each club project a success.

Ask your clubs to fill out an evaluation immediately following the week and mail you photographs of the activity that you can include in an upcoming publication. To encourage compliance, offer incentives such as alumni merchandise or free tickets to campus events. Include this evaluation information in your publications externally and, just as important, internally. Use it to brief your campus leaders, especially those (such as coaches and professors) who regularly make presentations to your alumni, to gain their support.

RECRUITING VOLUNTEERS

The tremendous challenge of recruiting alumni participants for community service undoubtedly will continue through the next generation. Use your best salespeople: students. Generally, alumni are captivated by students who function as service ambassadors during presentations at club events or through first-person vignettes in your publications or on your Web site. Hearing about shared experiences helping

others, spoken through the heart, tends to make people question why they are not participating. (At Notre Dame, we call this Catholic guilt!) You then simply have to offer opportunities for these individuals to serve and make signing up convenient for them.

Getting alumni to sign up is not as difficult as it may seem. Use mobilizing techniques such as active communication. Communication with potential participants goes far beyond your newsletter, which is a passive form of invitation and awareness. Realistically, you should expect a response rate of less than 10 percent from any article or advertisement seeking volunteers. The best way to recruit volunteers is to spend a third of your time at club events talking with alumni about community service projects. This method of active communication and cultivation will allow you to personally ask individuals to become involved in a specific project, at a specific time, performing a specific task. Be direct but pleasant in your invitation; individuals will feel obligated to participate.

Like a telephone solicitor, don't take a quick "no" for an answer. After promoting the benefits of service and receiving a commitment, follow up with a personal thank-you note and a reminder phone call just before the event.

Remember, people may be timid at first to get involved in anything new to them, especially a service project performed in partnership with another group. Therefore, you have to sell them on the concept. Once you match a volunteer and he or she reaps the personal rewards of service, you'll feel as if you've made the sales call of a lifetime.

PICKING THE PROJECT

Developing projects from scratch will be difficult and will require a considerable time commitment—not only on your part but, more important, on the part of your club community service coordinators. Therefore, partner with national service agencies that have local affiliates (much like an alumni association). At Notre Dame, many clubs organize joint projects with Habitat for Humanity, Christmas in April, The United Way, and cancer awareness organizations. This approach allows the agencies to plant more seeds while serving a wider audience.

When you advise your coordinators, suggest a variety of projects for the club (based on its size, resources, interests, and commitment). Poll club boards to determine common interests and discover where members already are volunteering through work, church, or in conjunction with their children. Parents of current students can be your top volunteers because they are often eager to feel part of your institution.

Encourage the club to explore piggy-backing with these established groups, and suggest that members all wear your school colors or logo to build a common sense of identity during the project.

Another way to jump-start a community service program is to encourage your clubs to sponsor a quick, no-fail service activity—such as a roadside cleanup—followed by lunch. During lunch, organize a brainstorming session to ascertain what other projects your alumni are interested in participating in; then schedule a brief planning meeting where everyone has to bring at least one other person. You'll have a full committee before you know it!

Still another method to sow an assortment of volunteers is to sponsor a project with alumni clubs from other institutions. This approach generally yields great results, especially if a friendly sense of competition is present. Events such as bone marrow identification, blood, and food drives; neighborhood clean-ups; and walkathons are ideal.

Finally, one of the simplest projects can literally help fill an ongoing need of every community. Instead of charging a fee for admittance to a club activity, ask attendees to bring a bag of canned goods for your local food pantry. (Offering a reduction in price per donated can also works well.) Before announcing this project, contact your partner agency to determine what items are in greatest need; this inquiry will be well appreciated. Consider organizing the drive in late winter, when most pantries have a depleted supply of goods.

Remind your graduates that a service project, like most club events, can be an enjoyable, social gathering. Take this ideal into account when you recruit participants because alumni, as members of their communities, can reap countless intrinsic benefits as they serve others—for truly, it is in giving that we receive. The key is to make the projects you select familiar and attractive, as well as useful to others.

Stress the word "others" so you do not attach labels to any group. It is all too simple to call the groups we serve "the working poor" or "the needy," when in fact they are people who deserve the same respect we exhibit for our alumni. By acknowledging this fact from the start, we can recognize the dignity and potential that the members of disparate groups have. Following this elementary form of protocol will result in much more meaningful, and enjoyable, projects as a form of experiential learning takes place.

CONCLUSION

As your community service program garden grows and you, your alumni, and your institution begin to reap the many rewards of serving others, keep in mind that it doesn't take a large group of volunteers to make a project a success. Even a small amount of service yields results. One person can make a difference—or start a garden.

8

CONTINUING EDUCATION

Dawn M. Dempsey

Ferris State University

Alumni continuing education programs should be central to the mission of an alumni relations office. Steven Calvert, vice president for alumni relations at Brown University, defines alumni continuing education as an "overall program for continuing the relationship between alumni and the university." The concept of providing continuing education for alumni is certainly not a new one. As early as 1913, Yale University was involved with an alumni education program; Amherst College's alumni education program appears to have been the first organized by an alumni association (in 1924). Interestingly enough, Amherst developed its program not solely to keep alumni closer to the university but also as part of the growing continuing education movement.

This chapter does not delve into the history or philosophy of alumni continuing education; instead, it focuses on a few key elements that will help you plan a successful alumni continuing education program. The chapter also highlights some factors to consider when you plan such programs—including researching the wants and needs of your alumni as opposed to making assumptions; considering alumni education from the adult learner perspective; and identifying the best delivery method and location for an alumni continuing education program.

UNDERSTANDING ALUMNI'S NEEDS

Alumni relations professionals need to be aware of, and responsive to, the continuing education needs of alumni. Research suggests that former students often regard their relationship with their alma mater as part of a lifelong cycle. For example, a study of

alumni expectations reported on in *Improving the Quality of Business Education*, by the American Marketing Association, revealed that alumni believe that their school affiliation provides benefits that go beyond graduation into their professional lives and that the institution is accountable for the continued career success of its graduates.

As with most alumni programs, age and stage of life should determine the types of services you offer to meet those specific needs. This principle, of course, does not follow the longstanding theory that "if we plan it, they will come." Instead, we should be aware that we have various "generations" of alumni and recognize that those varied generations are our market segments. We can research the wants or needs of each of these market segments and plan our programs accordingly. This approach allows us to effectively fulfill two objectives: First, we will secure a good participation rate; second, we will meet the needs of our alumni.

THE ADULT LEARNER PERSPECTIVE

A second key factor for success: Alumni continuing education programs must consider the adult learner perspective. Research suggests that adult learners experience significant growth at midlife in specific learning environments. The elements that make up those environments include safety, comfort, and support; self-directed learning; paced or challenged learning; active involvement; and regular feedback. Alumni may choose their alma mater for continuing education programs because they believe that most, if not all, of the elements that make up this specific learning environment will be present, based on their experience as undergraduates. We must consider alumni continuing education programs from the adult learner perspective as well as from our own perspective (which entails considering these programs as a means of sustaining the relationships we have with our alumni). Our responsibility is to provide educational opportunities that support the idea of providing significant growth at midlife.

PROGRAMMING AND DELIVERY METHODS

We certainly cannot and need not be experts in all facets of programming for our alumni. If you have an office of extended learning on your campus (some are called continuing education or lifelong learning offices), continuing education programs can arise naturally from a collaboration between that office and yours. Many programs that are developed and marketed to adult learners are also excellent programs to market to

segmented groups of alumni. Extended learning offices have a variety of programs geared to participants of all ages: summer sports and academic camps for youth, adult enrichment and certification courses, and job- or career-related continuing education courses, to name a few.

In his article, "Collaboration in Alumni Relations" on the Web publication *Suite 101*, Paul Clifford suggests several ways to expand your alumni program through collaboration. Clifford writes that there are experts on your campus with whom you can collaborate to bring about mutually beneficial results. Clifford cites the athletic department, the admissions and career offices, and the dining services office as examples. (He neglects to mention the office of extended learning, however.)

It need not be the case that, as Calvert suggests, alumni relations professionals will lose to the continuing education office their role of linking adults with their institutions as greater numbers of alumni return to the university setting to fulfill their educational needs. The success of alumni relations professionals is related to their ability to collaborate with the "experts" on their campuses. Programs offered in collaboration with other experts within the institution usually are delivered on site at our campuses. Often, however, alumni cannot get to our campuses, and we need to look at other delivery methods or locations.

The fastest growing delivery method for all types of programs is based on the use of technology. One example is Princeton University's online classes for its alumni members. This delivery method adds an entirely new dimension to alumni education programming, especially if we think about reaching significant numbers of our alumni as well as the environment that promotes significant midlife growth. In Princeton's program, alumni enroll in an online class taught by a Princeton faculty member; alumni can take the class whenever it is convenient for them. Recent graduates who are tied to their jobs, alumni with families who have home responsibilities as well as their jobs, and alumni from the earlier classes can all participate in these learning programs. Unfortunately, not all institutions can develop these kinds of programs because the costs can be quite prohibitive. Nevertheless, the value of online technology is potentially limitless for reaching alumni of all ages and in all geographic locations.

Programming for Alumni with Families

One of our biggest challenges in programming for alumni with children in the home stems from time restrictions. Alumni have to divide their time between job-related responsibilities and other civic and social responsibilities that keep them away from

home and prevent them from spending quality time with their families. We are dealing with the "limited disposable time" factor. This challenge can become an opportunity for alumni professionals to provide family-inclusive programs. With a little imagination and creativity, we can plan programs that involve our alumni as well as their spouses and children. Alumni want to feel that they can participate in a meaningful educational or enrichment opportunity while they spend quality time with their families—even though not every minute of the program is spent together.

An example of this kind of opportunity would be an alumni program offered in collaboration with an athletic or academic camp for kids. This arrangement is ideal for alumni who have school-age children because it enables alumni and their children to participate in a collective family learning exercise.

Programming for Young Alumni or Recent Graduates

Younger alumni who are just beginning their careers present different programming challenges—as well as opportunities. Young alumni need to perceive a real value in attending an event. They won't commit too far in advance, and they often won't come without a friend. Young alumni also view technical training as the benefit or necessity for the '90s (and into the unforeseeable future) and value it above most other perks. Most of our institutions can provide continuing education in any number of technical skills. Many even have the capability of teaching through the "learning-in-the-box" method by using online courses.

Job security is becoming a thing of the past—for alumni with families as well as more recent graduates without families. Following up on its landmark Workforce 2000 report, the Hudson Institute released an updated report for the year 2020 that makes new predictions mainly because employers have been cyclically "resizing" their workforces. Employees now need more advanced mathematical, language, and reasoning skills. Unlike the transformation during the Industrial Revolution—in which people moved en masse from farms to factories—the shift this time will be related to cognitive skills. Our institutions offer many courses that can satisfy the needs of our alumni who face these kinds of challenges.

Programming for Alumni from Earlier Classes

According to an article appearing in the Michigan Education Special Services Association newsletter, the number of people age 65 and older has increased by a factor of 11 since 1900, and the number of Americans 100 years of age or older has more than doubled since 1980. After age 75, most women are widowed and live alone,

whereas most men in this age group are married and live with their wives. Five percent of elderly people live in nursing homes, and 70 percent of those residents are women. All 50 states will see their elderly populations grow in the next 25 years; by the year 2020, the number of elderly people in Alaska, Arizona, California, Colorado, Nevada, Utah, and Washington will more than double. Many members of this booming elderly population will be our alumni. What types of continuing education programs can we offer to this major market segment?

The Elderhostel program is an excellent example of an educational program geared to older adult learners. Elderhostel is a nonprofit organization that collaborates with universities and other educational organizations to offer inexpensive, diverse, and accessible learning and travel opportunities to older adults interested in lifelong education. If your institution serves as a host institution for an Elderhostel program, your alumni office may want to consider collaborating with the sponsoring office or department to market this program to your older alumni.

Alumni from earlier classes have shifted their educational interests from career-promoting or job-related courses to life-enriching experiences such as travel and other mind-stimulating learning opportunities. As a result, this particular market segment has completely different program challenges. We are programming for a market that has more available income and much more disposable time, and values learning for learning's sake (as opposed to learning out of necessity for job requirements). Gone are the days when retirement meant getting out the rocking chair and sitting around reminiscing about the "good old days."

> *It is time that we had uncommon schools...that we did not leave off our education when we begin to be men and women. It is time that villages were universities, and their elder inhabitants the fellows of the universities, with leisure—if they are, indeed, so well off, to pursue liberal studies the rest of their lives.*
>
> —Henry David Thoreau

Thoreau had a vision for these "uncommon schools." Many colleges and universities today are assisting their older adult learners in setting up Institutes for Learning in Retirement (ILR) programs. In the past 10 years, more than 200 of these institutes have sprung up in North America, each with about 225 members. The members are responsible for ILR programs and the contents of the courses, and social interaction is encouraged. Through ILRs, older adults pursue intellectual interests

in their leisure time with no tests or grades. ILRs enable older learners to be on campus in a learning environment that again promotes significant personal growth.

A FINAL NOTE

A final key factor in planning successful alumni continuing education programs is to build on what you already have available. If you have a travel program, enlist the expertise of a faculty member and market it as an alumni education program. If your campus offers career or technical seminars or workshops, market them to your alumni as alumni continuing education programs. Not only will you be making these programs attractive to your alumni, you also may be avoiding some of the mailing restrictions placed upon you by the postal service.

Obviously, many other factors can help you plan successful alumni continuing education programs. The ideas in this chapter may at least give you a starting point for planning purposes. Kay Kohl, executive director of the National University Continuing Education Association, reports that mature adults increasingly expect universities to provide opportunities for high-quality, lifelong learning. Continuing education may once have been peripheral to an institution's mission, but today it is becoming central. Our job as alumni relations professionals is to maintain the linkage between our alumni as adult learners and their alma mater. Whether we offer these opportunities independently or in conjunction with other campus resources, these lifelong, intellectual courses build on the understanding that education is the essence of all alumni programming, as well as on what all alumni hold in common—beginning with their undergraduate experience.

NOTES

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9

HOMECOMING

Sheila M. McDaniel

University of Redlands

In my first year of college at the University of Notre Dame, I served on the Freshman Advisory Council—a group composed of one first-year student per dorm that organized activities for the class and represented the class to the university administration. Early in the semester, university administrators told us that Homecoming weekend (my first college Homecoming!) was going to take place in October; the game would be against the University of Pittsburgh. They also told us that each class was expected to create a float for the Homecoming Parade, which would take place in Notre Dame Stadium during halftime. The Freshman Advisory Council rose to the occasion, creating a float that would surely bring honor to the Freshman Class. As it turned out, the other classes did not embrace "float-building" quite as enthusiastically as we did, and sadly, our float was vandalized the night before the Big Game. In the end, the parade was cancelled. That was my last official Homecoming experience at my alma mater.

As I look back on that experience now—as an alumni director at another institution—I draw two lessons about Homecoming:

- Establishing a tradition requires sufficient institutional support and resources to survive the start-up phase.
- Sometimes, Homecoming is not the right tradition to start (or continue, or revive).

Homecoming is one of many programs most alumni offices organize or coordinate. As with everything we do, Homecoming cannot be all things to all people. You must be selective about the audiences you target, the programming you offer, and the resources you allocate. This chapter explores those issues and provides some items to consider regardless of where your institution falls on the Homecoming continuum.

First, you need to step back and examine why you do alumni programming in general. Review your association's mission. Is it "to connect or reconnect alumni" with their alma mater (UCLA) or "to engage alumni, friends, and the university in mutual service and communication to help ensure continued excellence in the life of" the institution (University of Redlands)? Or, have you articulated specific goals and objectives, such as "to support, celebrate and preserve campus tradition" or "to introduce current students to the expectations of future alumni involvement and service?" Your Homecoming programming can be structured to achieve one or more of these goals.

BEFORE YOU START A HOMECOMING PROGRAM

If your institution already has Homecoming, don't be afraid to ask questions about why it exists. How did it get started? What goals do you have for Homecoming? Is attendance increasing, decreasing, or holding steady? What programs have been added to it—or dropped—and why?

Most institutions probably would say that Homecoming was in its heyday in the 1950s. Traditions such as crowning a queen and building floats were more popular then; Greek organizations were stronger. There was less competition for people's time, both internally—alumni offices were not offering as many other programs—and externally; people's lives have become more complicated, and other leisure activities have taken hold.

If your institution does not have Homecoming, you should consider the following questions:

- Who wants Homecoming? Has your president/institutional leader expressed interest? Where does your alumni volunteer leadership stand? How about other campus colleagues—particularly student life administrators? Are any of these players pushing for it? And what do they hope to accomplish by creating Homecoming?
- What resources (staff, volunteer, and financial) are available to support a start-up effort? Promotion and marketing will be a significant part of any Homecoming budget.
- What types of programming will enable you to accomplish your goals?
- What has worked elsewhere? Remember that every institution is different, so look at your own unique circumstances.

Take, leave, or adjust anything you find among the following ideas to meet your institution's needs:

Combine class reunion programming with Homecoming weekend. Some institutions wouldn't have it any other way. They see no logic in holding a separate class reunion weekend at another time of year. Would this model suit your institution? If not, look for other natural constituencies that could be a foundation of your Homecoming effort.

Consider your institution's special alumni constituencies. You might choose to focus on groups that have traditionally been active, such as Greek organizations, or others that have not—such as alumni from the 1970s, nontraditional students, or younger alumni with young families. If you want to concentrate on nonparticipants, talk to them first. Find out what would encourage them to come back. Traditional activities may not be a draw for them. You'll need to think differently and creatively about what Homecoming means. In fact, you may want to consider whether you need to call the program "Homecoming" at all. That term itself evokes all kinds of traditional images. Would some other descriptor better suit the audience you hope to attract? You also should consider additional support needed to entice these groups back to campus, such as family-friendly programming or child care.

Team up with athletics. It can help if your institution has a signature fall sport that can be a focus for Homecoming. For most schools, that sport is football. Be deliberate about working with colleagues in athletics to promote the Big Game—whatever that is—as well as other athletic events taking place that weekend. Don't neglect the rising popularity and competitiveness of women's athletics. If your campus has the facilities and the athletic department will partner with you, consider alumni athletic events, student versus alumni athletic events, or family-oriented sports activities (depending on your target audience).

For many years, Tufts University has promoted a "Homecoming Away" program, whereby Tufts alumni club members across the country get together on Homecoming Day with alumni from whatever school the football team is playing back on campus. The alums may play touch football, softball, or any other sport. They call in their score to the press box at Tufts, and the scores are then relayed to the crowd.

Connect with students. We all know that students are future alumni, so start early in helping them develop their own Homecoming traditions. At

some schools, the student alumni association (SAA) leads the effort. At other institutions, student organizers come from student government. Be sure these students are full participants in Homecoming planning. You usually can increase student participation by holding Homecoming later in the fall, so student organizers have more time to put activities together and create "hype." Remember to consider the academic calendar as well when you schedule Homecoming; avoid midterms, fall break, and any other major programming that affects a lot of students.

Combine with Parent and Family Day activities. Does your campus experience a mass exodus of students on the weekends unless something big is taking place? Encourage colleagues who coordinate parent programming to use Homecoming as an anchor for their efforts. Students will be more likely to remain on campus if parents are coming to visit, and your institution may enjoy some economies of scale through such a partnership.

Offer something for prospective students. Admissions colleagues want to show the campus in the best light. Enabling prospective students to see the campus "alive" with people and school spirit—again, more of an issue on a campus with a weekend exodus—sends a very positive message. One caveat: Work closely with admissions so prospective students have no trouble finding parking, getting meals, or acquiring tickets for on-campus events.

Hold trustee meetings during Homecoming. Having your institution's governing board take an active role in Homecoming provides many benefits. The weekend should showcase the work of the alumni relations office and, indeed, the entire campus. Some trustees are alumni, but many are not—so use this opportunity to engage trustees in the life of your institution. Perhaps some of them could be celebrity judges for dorm-decorating contests or "special guest" participants in other Homecoming activities.

Don't forget the Academy. From "classes without quizzes" to departmental open houses, faculty members can be an important draw for alumni. Think about involving emeritus faculty members, many of whom would love to come back and see their former students. Promoting the return of a favorite professor might also help increase attendance.

Celebrate institutional milestones. Is Homecoming the right time to introduce a new campus leader to alumni and friends? Less formal than an inauguration, Homecoming can provide an excellent platform for a new CEO or other campus leader. Homecoming also might be the "last hurrah" for a

favorite faculty member, dean, or president who is retiring. Along similar lines, might you celebrate alumni or student accomplishments at Homecoming? Is there an appropriate venue?

Look for development angles. Work in partnership with your advancement colleagues to maximize fund-raising opportunities. Homecoming can provide a wonderful backdrop for building dedications or an opportunity for major gift prospects to see your campus shine. The development office could sponsor a special pregame event for donors of a certain level.

Take time for training. Do you hold periodic alumni volunteer orientation programs? If you have sufficient resources, consider holding such an orientation during Homecoming.

Involve the community. Would a community focus for Homecoming make sense at your institution? Perhaps many of your alumni stay in the area after graduating, or your school needs to establish closer ties to the surrounding area. Work with community relations or public relations colleagues to see if there is a good fit.

Serve others. Does your institution have a strong community service bent? If so, consider a service program connected to Homecoming. How about a campus beautification project or an open house that brings children with disabilities to campus for the day—and perhaps their first Homecoming game?

EVALUATING YOUR HOMECOMING PROGRAM

If your institution already has Homecoming, be sure you can answer the questions listed earlier in this chapter, plus these additional questions:

- How is the date for Homecoming determined, and when is it confirmed? (Eighteen months to two years before the event is great if you can make it happen.)
- Is there a theme? If so, who determines it?
- Do you have a planning committee? If so, who serves on it? What are committee members expected to do? Is there a written job description?
- What do you expect of alumni board members on Homecoming weekend?
- Who writes, edits, designs, produces, and pays for Homecoming publications and other marketing materials? Don't forget about electronic communications!

- Who controls campus space on Homecoming weekend?
- Who pays for equipment rentals, extra cleanings, special openings of buildings, and so forth?
- Who caters the meals? If you are working with the campus food service, can they adjust their usual weekend schedule to mesh with Homecoming activities?
- How do you address alcohol consumption issues?
- What is the weather factor?
- How does your institution feel about corporate sponsorship to help offset costs?
- How do you serve far-flung alumni who can't attend? Ideas such as "virtual" Homecoming are becoming more and more popular.
- How does the alumni relations office evaluate the success of Homecoming?
- How do you assess whether Homecoming is meeting the needs of other campus departments?

If your institution is wrestling with whether to continue to offer Homecoming, you must first articulate your goals for Homecoming and then evaluate whether you have achieved them. For example, if your goal is to attract young alumni, and the only people who show up are alumni from the 1950s and 1960s, examine why. Do your marketing materials still look traditional while your words say otherwise?

Before you drop Homecoming, honestly assess what not doing Homecoming means. This decision could result in lost opportunities to meet certain alumni relations goals, as well as broader institutional goals. If these goals are priorities for your institution, are there other ways to accomplish them? Survey your alumni "movers and shakers," as well as a more general populace. You may find that there is overwhelming apathy—and it is time to move in another direction.

CONCLUSION

Whether your institution is considering starting, revamping, or eliminating a Homecoming program, you need to be in a position to make that very important recommendation and provide evidence to support your stance. Remember: "Because we've always done it this way" is not an acceptable answer. As an alumni relations professional, you play a critical role in ensuring that your institution's Homecoming program (or lack thereof) is the right approach given your school's unique circumstances.

10

ACTIVATING AN EFFECTIVE ALUMNI LEGISLATIVE NETWORK

Margaret Sughrue Carlson
and Les Heen

University of Minnesota Alumni Association

It was the best grassroots campaign I've seen in 20 years at the State Capitol." That's how lobbyist and University of Minnesota Regent Bill Peterson described the University of Minnesota Alumni Association's (UMAA) impact on the 1998 Minnesota legislature.

To present a unified front for the legislative bonding request of $249 million, alumni, faculty members, and staff members wore "249" buttons throughout the winter and spring. Seventy percent of University of Minnesota alumni reside in the state of Minnesota following their graduation; the university capitalized on this geographic density to activate a groundswell of support.

Getting out an organized and consistent message paid off. The university received nearly $207 million in state funding for building projects and an additional $38 million in supplemental budget funds. The total of $245 million was nearly double what the university had ever received in a bonding year.

We started our legislative network at Minnesota 13 years ago with a handful of people; our network has now grown to 2,700 members. In addition, thousands of other volunteers and friends of the university became involved in 1998, although they were not formally part of the alumni network. When our supporters call, legislators listen.

Alumni can be powerful advocates for state support of public colleges and universities if you recognize how important legislative advocacy is, commit resources

to it, and use a few basic principles—along with some "rules-of-the-road" to guide your work.

How important is advocacy? In the opinion of Peterson and others, it may be the most important thing alumni can do for public institutions because legislative success depends on pressure from alumni—including letters, visits, e-mails, and phone calls. Those messages are becoming more important as new laws reduce lobbyist access to lawmakers.

RESOURCES

An advocacy program will get nowhere without the necessary monetary and human resources. Even with the university's lobbying staff leading the way, our alumni association at the University of Minnesota had to commit real dollars and creative energy to mobilize an effective grassroots network. Although we began our advocacy initiatives with existing staff members taking on added responsibilities, our program matured to a point that we needed to hire an experienced professional to guide our legislative activities. At critical times, alumni staff members mobilize volunteers to contact lawmakers. Every one of these volunteers—from the receptionist to collegiate society staff to chapter organizers—gets involved in the effort.

PRINCIPLES AND RULES

The three I's—inform, inspire, and involve—are the keys to success. For volunteers to be effective, they need to feel well-informed. Often, having them feel well-informed is just as important as actually informing them because the biggest barrier for new volunteers is the idea that legislators are intimidating. Alumni must be comfortable with the university's "ask" before you call. We stress that people don't have to be political wizards; the network will help present the university's issues in simple language that they can share with others.

Once volunteers get used to calling or writing, they understand that they don't need all the answers. (They also enjoy finding out that their legislators are friendly and value their opinion.) We also tell alumni that they can't possibly have all the answers. It helps if they understand that professional lobbyists often say, "I don't know the answer, Senator, but I'll find out for you."

To motivate alumni, we start every legislative session with a briefing at which the university president explains the legislative request to 200 or so of our most dedicated

volunteers. We also invite faculty members, university lobbyists, students, and others, so that alumni can feel the excitement and realize that they are part of a team. They leave the event informed and inspired.

We involve alumni by telling them exactly *when* they need to call. Timing is critical. We send action alerts—primarily by electronic fax and e-mail—asking alumni to call their legislators by a specific date with a short and clear message. In 1998, that message was, "Support the $249 million university bonding request." Legislators became so familiar with this message that all of them knew what "249" meant. They also knew exactly what our volunteers were expecting—and that anything less was not good enough.

In addition to the three I's, there are a few important rules to follow when running a legislative advocacy program.

Rule #1—Gain the support of, and stay in regular communication with, your institutional lobbying team. Every message we send to volunteers is approved by our lobbyists. In the political world, mixed messages are deadly.

Rule #2—Remain nonpartisan. This principle is extremely important for your reputation, as well as your nonprofit tax status. We encourage volunteers to be politically active and support legislative candidates, but we never suggest which candidates to support. For tax reasons, we also do not get involved with political action committees. Part of our strength and our good reputation comes from being a group with one clear, nonpartisan agenda: supporting the university.

Rule #3—Check relevant laws and institutional guidelines regarding the use of public property and equipment. Many states restrict the use of public property for political purposes or messages.

TIPS FOR MAXIMUM EFFECTIVENESS

Recruit people for your legislative efforts at every opportunity. Your board members, key volunteers, donors, and friends should be well-informed about advocacy and should understand that calling legislators is one of the best ways for them to support the university. A sample recruitment piece from the University of Minnesota Alumni Association is shown in Figure 10-1.

Keep people informed and involved all year long. Advocacy is not limited to the peak of the legislative session. Remember that legislators are people, too. They like hearing from constituents even when the constituents don't need anything.

Make it easy. Give volunteers more than the basic information. Give them

Figure 10-1. Legislative Network Direct Mail Piece

Courtesy of the University of Minnesota Alumni Association

addresses for legislators, paper to write on, Web sites for further information, and so forth. We have often distributed blank postcards at meetings and asked volunteers to write "support the university" on one side and their legislator's name on the other. A handwritten note works better than a lengthy letter; resist the temptation to give volunteers form letters because their impact on legislators is minimal. And "the quicker the better" should be the byword. In every instance, make sure the legislators know who their constituents are.

75 BEST COPY AVAILABLE

Show alumni how their help will make a difference. A new building, a new program, lower tuition—these are common items on a university's legislative wish list, and everyone can understand what they mean.

Push the people who have the most at stake. If your computer science department is asking lawmakers for a new building, make sure computer science alumni know about this effort. They'll be excited—and more likely to call legislators.

Reach, stretch, go beyond the borders. We put a special insert in our magazine with a message from the president about the importance of legislative support. This insert caused one of our members from Detroit to call an old friend at the capitol in St. Paul to say, "I hope you're supporting the U." Former Minnesotans active in Sun Belt alumni chapters also offered to call their old legislative friends on behalf of the university.

Thank the volunteers. Show them you appreciate their hard work. You can demonstrate your appreciation through articles in your magazine, a reception at the president's house, or recognition at a volunteer awards ceremony.

Thank the elected officials. Just as too few job applicants send thank-you notes after an interview, too few constituents send thanks to their legislators or the governor. One reason our efforts succeed is that we remember this important detail. When we asked volunteers to thank the governor in 1998, his staff jokingly asked us to back off because they were spending so much time opening thank-you messages.

CONCLUSION

From its founding in 1904, the University of Minnesota Alumni Association focused primarily on fellowship activities. In the mid-1980s, the association decided to adopt "alumni advocacy" as one of its major goals.

Moving into the advocacy arena took vision, courage, tenacity, and resources. When the alumni association first suggested to a key central administrator that it might organize a legislative network, the administrator replied, "We don't need Amateur Night at the capitol. Leave the lobbying to the professionals." Through the years, however, we have institutionalized our commitment to advocacy through time and staff resources. Equally important, we have chosen for board positions alumni who give high priority to advocacy. Above all, we have been successful. Results prove that, with careful attention to detail and message, alumni can help the university achieve great success at the legislative level.

While updating our strategic plan recently, we analyzed our association's

effectiveness. The legislative network was uniformly and widely praised as one of the alumni association's most important contributions to the University of Minnesota. As I wrote to alumni in our association magazine, "If the University of Minnesota is a priority for you, and your views are echoed by thousands of other thoughtful voters, rest assured, those priorities will be heard and acted upon by lawmakers."

We are proud of our achievements in alumni advocacy at the University of Minnesota and we hope we have provided some tips, from our own experience, that will lead your programs to success.

11

BUILDING AN EFFECTIVE ALUMNI MERCHANDISE MARKETING PROGRAM

R. Wayne McDaniel

University of Florida

If you are a newcomer to the field of alumni relations and you want to build a merchandise marketing program that will provide a lot of money to your alumni association and expand the identity of your institution and association, you have just embarked on one of the most exciting journeys you will ever experience. Congratulations on your choice of occupations! Read all the books and magazine articles you can and attend as many conferences as possible—but most of all, talk with your counterparts at peer institutions; they will be your best and most reliable information resources.

This chapter explains how you can effectively create a merchandise marketing program that will provide additional income and help connect your alumni to your institution. More and more advancement offices and alumni associations are developing alternate revenue sources to meet budget requirements, increase and expand programs, or add additional staff. One of the most profitable and desirable assets at your disposal is the list of alumni and friends in your database; you can approach these people to market items bearing your institution's or alumni association's logo. This chapter reviews the issues you will confront and helps you answer the question, "Is this approach right for your institution and alumni association?"

During my 20 years as executive director of the University of Florida Alumni Association, I have seen numerous items presented as the perfect alumni association fund raiser; many have been marginal at best. Alumni relations offices frequently

encounter vendors trying to convince us that our alumni cannot live without their products. All of these vendors are trying to satisfy the needs of our alumni—and we all have needs. Philip Kotler, author of *Principles of Marketing* and one of the leading authorities on marketing, defines a human need as "a state of felt deprivation in a person." Most people will either do whatever it takes to satisfy their need (they will buy something) or find some way to suppress the desire for that need (they will not buy). This dynamic is an important factor in alumni marketing and merchandising—our ability to identify the needs of our alumni and present products for them to purchase that will satisfy that need and still benefit our institution.

THINGS TO CONSIDER

Before you initiate an alumni merchandise marketing program, consider the following questions:

- What are your reasons for starting a merchandise marketing program?
- Does this type of program fit the mission of your alumni association?
- What portion of your revenue budget do you expect this program to produce?
- Who controls the licensing of your logos and trademarks?
- Will these types of marketing programs affect your postal permit?
- Will you need to share the income with other units on campus?
- Are you prepared to pay Unrelated Business Income Tax (UBIT)?
- How should you segment your audience?
- Who will make the decision about what to market?

Reasons for Initiating a Merchandise Marketing Program

A merchandise marketing program can be a boon for any institution or association for a variety of reasons; the first and most obvious is revenue. Agreements with vendors can produce income for all parties involved. Remember: The vendors need you, but you have your choice of vendors. Structure vendor agreements to your benefit. Make sure you receive a realistic commission or royalty, or offer the product at a lower price than that available to the general public. If you are a membership association, have a member and nonmember pricing structure; use the offering to highlight the benefits of membership.

Another excellent reason to start this type of program is to increase and improve the institution's name recognition. You can build pride in your institution every time

someone purchases a shirt, jacket, hat, bumper sticker, window decal, watch, ring, or other item highlighting your institutional name or logo. You will also discover that these customers are more likely to be members, attend club or chapter events, participate in reunions, contribute to the annual fund, and generally be more supportive than non-buyers.

Merchandise Marketing and Your Mission Statement

The mission and purpose of your association probably are similar to those of other alumni associations in the sense that an integral part of what you are expected to do is to enhance the relationship between your alumni and the institution. The best and longest-lasting relationships are relationships with alumni and friends who have developed a sense of pride and commitment regarding your institution; these individuals stay with you. Each time they buy or receive an item of clothing with your mark or logo, they are demonstrating that pride; each time they put a sticker on their vehicle or display a flag or banner, they are indicating their commitment. Each purchase also increases the "investment" of the alum in the institution. By satisfying their needs, you generate income, create a better relationship, and initiate a communication.

Are You Doing This for the Money?

In addition to establishing symbols of pride, merchandise marketing gives you the opportunity to add to your revenue. The amount you will generate can be difficult to project unless you have a track record with the types of merchandise you are considering. Twice each year, my association offers parents of graduating seniors the opportunity to purchase a watch with our university seal as a graduation present. Because we have done this mailing for several years, we can project our income from this offering on an annual basis. Income from merchandise programs in which you offer a standard item (shirt, hat, visor, tie, etc.) to a large segment of your database will be more difficult to project. You should regard your merchandise marketing program as supplemental revenue. Do not try to fund a large portion of your budget from this source.

A well-planned and organized merchandise marketing program can and will produce revenue. The primary benefits of this type of programming, however, are the pride, loyalty, and commitment you develop in your alumni by offering them the opportunity to buy quality products with your institution's or association's mark.

Who Controls the Licensing Program?

This issue is very important, and you need complete information before you begin to market merchandise. What is a license? Generally, a license is approval, for a specified fee, granted by the institution to a vendor to include a mark or logo on a product and sell it to a general audience. Licensing directors are the watchdogs over which vendors have registered their products and paid the proper fee or royalty to the institution. Every product carrying the mark or logo of your institution should be licensed. Some unit or department on your campus has been designated the keeper of the mark and is responsible for monitoring who is and is not licensed. Royalties generated from licensing can be substantial; make sure you meet with the unit or department in charge and develop a relationship and agreement with them pertaining to this income stream.

If your association has a logo, either trademark the logo or enter into a written agreement with the campus office that controls licensing that will allow you to market products with your logo without paying a licensing fee. It is very important that someone control the use of your marks and logos; it is equally important for you to play an active role in that process.

Will This Program Affect Your Postal Permit?

If you are mailing under a not-for-profit postal permit, make sure you comply with the rules and regulations of the national U.S. Postal Service regarding cooperative mailings. Some situations will allow you to continue to use a not-for-profit permit. If you are marketing a particular brand name or product name, check with your local postmaster or mailing house before proceeding.

Are You Willing to Share Income?

Whenever there are large amounts of money to be made, everyone wants a piece of the pie. Merchandise marketing agreements can vary a great deal. Make sure you have a written understanding or agreement regarding how the income will be shared, if at all, before you launch the program. Revenue from affinity credit card programs, phone card programs, and similar products and services marketed to a large audience often is shared among campus entities. If you share the income, you should also share the expenses; deduct the cost of staff time, postage, printing, mail service, and other appropriate expenses from the gross revenue before making any settlement. You will often benefit by sharing a program with another campus unit—especially if that unit has a high profile (e.g., athletics) and will assist with marketing efforts. There is no need to be greedy; just be smart in your dealings with these campus units.

Are You Prepared to Pay Unrelated Business Income Tax (UBIT)?

UBIT is a tax paid on income not directly related to your not-for-profit educational purpose. You can structure your merchandise marketing program so that it meets Internal Revenue Service (IRS) tests and eliminate the need to pay UBIT, or you can claim the income as a royalty rather than a commission. In order for the income to qualify as a royalty, you must play a passive role in product marketing; all you should do is provide a list of names and possibly a letter announcing the product or program (but not endorsing that product or program). UBIT has become an extremely sensitive area that is under close scrutiny by the IRS; consult with a qualified tax expert for complete information.

Segmenting or Targeting Your Audience

Some programs, products, and services are more appealing to one age group or occupational group than another. By using information in your database, you can segment your audience by age, occupation, location, or other factors to reach the best audience for the products or programs you want to market. This segmentation can be a double-edged sword, however. If you segment your database, for example, you run the risk of having to pay UBIT because you have manipulated the data provided to the vendor—and that is considered active participation. There are alternatives; consult with your legal or tax counsel for this advice.

Who Will Decide What to Market?

After you have satisfactorily answered all of these questions, after qualified counsel has approved the standard contract, and after you are certain all of the potential vendors have met the licensing standards, there is only one thing left to decide: What will you market? Enlist a marketing committee—comprising members of your board of directors or other volunteers—to review your general plan. This committee should approve and support the concept of merchandise marketing and make recommendations regarding basic items to market. Final decisions regarding the types of merchandise you offer should be the responsibility of the executive director and the marketing staff because they have the opportunity to see, touch, and preview the merchandise.

If you offer low-quality merchandise, you will not be in business very long. As the marketing professional, you have the responsibility to do everything possible to make sure the items you offer are of the highest quality and can be returned by your customers without question. People expect quality; because your association has

introduced the product, your alumni will complain to you first.

In addition to selecting the merchandise you will offer to your audience, you will most likely have to decide if you will offer other types of programs that may (or may not) produce revenue, such as travel programs, insurance, long distance phone service, alumni directories, affinity credit cards, and more.

Travel Programs. These programs vary from one institution to another; consider offering a variety of programs with a wide price range. A mixture of domestic and international trips is a good idea. Consider sponsoring cruises, as well, because the ship becomes your hotel—thereby reducing the amount of packing and unpacking. The use of a campus dignitary as a host is always helpful in attracting travelers, and having a staff member, faculty host, or volunteer for each trip can be very beneficial in terms of fund raising and alumni relations. Try to arrange receptions with alumni who live in the countries or areas you visit, and always tell your travelers how much you appreciate their participation in your association's programs. (See Chapter Four for more on alumni travel programs.)

Affinity Credit Cards. This program has been a hot topic recently. Such programs have generated a good deal of revenue for many institutions. Although the days when institutions could make millions of dollars from credit card programs are fading fast, the value of these products is still very strong. Negotiate a firm contract; remember that the vendors need you much more than you need them. This program may be one of the areas in which you share the revenue with another campus unit; this partnership can increase the participation rate. A credit card program is a great way to promote and market your institution because every time the card is used someone will see your logo or campus symbol on the card.

Discounts for hotels, restaurants, and car rentals. There are a lot of opportunities in these areas with companies who will do all the marketing and contract negotiations for you. These programs should carry no cost to you, but they also will provide very little revenue. They are, however, a very good member benefit or service.

Vanity license plates. Many states have approved the creation of vanity car tags; these plates can generate large sums of income. In Florida, statutes direct the expenditure of this income (most of which supports student scholarship programs). Through our alumni club network, we have been successful in getting approval for vanity tags in several other states. These programs do not produce any revenue to the institution or the clubs, but they are a point of pride for our alumni.

Insurance. Many institutions have developed insurance programs. The most

common policies are term life insurance, short-term medical coverage for new and young alumni, catastrophic medical coverage as a supplement to medical insurance, and property and casualty insurance. These programs are useful to many alumni, young and old, and normally are offered at rates not available to the general public.

Other programs. Other programs and services that may be appropriate to offer on your campus or to your alumni include long-distance telephone discounts, campus picture books or viewbooks, championship season books for athletic teams, athletic travel programs, private dinner clubs or university clubs, summer camps, graduation gifts, alumni directories, continuing care retirement centers, investment services, home mortgages, car insurance, young alumni travel programs, Internet services, and cellular phone service.

Regardless of what you decide to market, always keep the following factors paramount in your product or program evaluation. Make sure the product or program is of the highest quality possible; deal with highly recommended vendors who have done programs on peer campuses and have received good reports. Offer your alumni something they cannot buy elsewhere or a price that is not available to the general public. For example, your insurance program must be offered at a price that is not available through local agents—especially when the local agents are your alumni. If your alumni association has a dues requirement, always offer a member and nonmember pricing structure; if you are not membership based, you can offer discounted pricing to certain levels of donors. Either way, you create value in your merchandise marketing program.

CONCLUSION

What are the benefits to your institution and/or association from all this merchandise marketing? Are you achieving your goals? Is there a real or perceived value?

Regardless of the size of the institution, merchandise marketing programs have proven to be a tremendous public relations asset. Any time an alum or friend is wearing a shirt or hat featuring your institutional mark or logo, they are advertising for you. Traveling a long distance from your campus and seeing someone proudly displaying your colors is especially gratifying; this is advertising and public relations that you cannot otherwise purchase. In addition to this good will, you are achieving your goal of producing additional revenue to support new programs or scholarships, pay for additional staff, or simply enhancing your budget. The real value, however, is in creating a base of supportive alumni and friends who will be better donors, join your

clubs and chapters, and attend your activities and events. Everybody wins with a successful merchandise marketing program.

NOTES

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12

MEMBERSHIP PROGRAMS

Loren R. Taylor

University of Illinois Alumni Association

Membership has long been an important component of alumni association programming. Many associations have found it useful to establish membership programs, typically manifested through payment of dues by individual alumni. There are nearly as many reasons for creating and supporting membership programs as there are associations that offer them: Membership can be a basic indicator of a graduate's loyalty to, and affinity for his or her alma mater; it can aid in maintaining contact with alumni who have expressed an interest in a lifelong relationship with the institution; it can enhance established connections with supportive alumni; it can create a cadre of friends that can be mobilized on behalf of the school or the association; and it can produce a significant amount of revenue.

This chapter deals with membership and dues programs as basic building blocks for a comprehensive alumni association that offers a broad variety of programs and services, provides opportunities for meaningful involvement on the part of its constituents, and communicates with alumni effectively and on a timely basis. It explores reasons that alumni choose to join an alumni association, various membership categories, the advantages and disadvantages of membership programs, and ways to obtain new members—as well as how to retain existing members.

WHY BECOME A MEMBER?

This question, perhaps more than any other, will be foremost in the mind of any alumni officer attempting to build a strong program. Most alumni associations have a

potential market in the tens of thousands; an increasing number of institutions have markets that reach hundreds of thousands of alumni. Predicting how an individual alum will answer this question can be daunting. Multiply the complexity of predicting an individual's reason, or reasons, by the total number of individuals in your nonmember alumni body, and it may seem an impossible assignment.

Many associations have found it useful to answer the question of why a graduate becomes a member in two ways: because of the intrinsic satisfaction the individual receives from supporting his or her alma mater; and because of the value—perceived and actual—of benefits, services, and programs available to members.

With respect to the satisfaction the individual receives from being supportive of his or her institution, no one can fully determine what will trigger such a feeling—it may be a fond memory of one's days on campus, a kind favor from someone affiliated with the institution, perhaps even a decision by the legislature to lend (or withdraw) support from the budget that supports the institution. A thoughtful membership officer will know and understand the institution particularly well, identify the aspects of campus life that are most likely to stimulate fond memories, and use them in well-crafted communications to catch the attention of the potential member. Appealing to an individual's sense of loyalty, evoking memories of a nostalgic time or place, and eliciting feelings of obligation and commitment can be extremely effective membership tools.

It is no less important, however, to provide good value to those whom you wish to have as members. The more pragmatic individuals within an alumni body will expect to receive reasonable benefits in exchange for their willingness to become members. Because this exchange of commitment for benefits—a transaction frequently taking the form of dues payments—is so inextricably linked, membership officers often are responsible for selecting the benefits offered by the organization. To be most successful, an alumni association must provide benefits, services, and programs that prospective and current members regard as worthwhile, competitive, and meaningful.

Of course, most of us cannot be classified simply as pragmatic or having strong feelings for our alma mater—and certainly the two are not mutually exclusive. Rather, we typically lean toward one tendency or another, with a multitude of additional factors mixed in. Alumni at some institutions—particularly more traditional, residential schools—can be expected to show inherently strong feelings toward the institution. Alumni at other institutions may demonstrate little or no affinity to the institution but still have an interest in participating with the alumni association as a

member. Membership programs that identify the greatest interests and needs of their alumni, and respond to them, are likely to be most successful.

TYPES OF MEMBERSHIP

In most cases, membership in a dues program consists of two primary categories: annual and life. By becoming an annual member, the individual obviously receives a year's worth of benefits and services, with an opportunity to renew the membership at the end of the 12-month period. Life memberships, on the other hand, provide a lifetime of programs and communications and often come with additional benefits or recognition in return for the member's long-term commitment to the institution and its alumni association.

Determining the cost of a life membership is trickier than determining the cost of annual memberships. Annual memberships can be priced at or around the cost of services provided for one year. You can never define exactly how long any life membership will last, however. Take great care in deciding an amount to charge for long-term memberships.

Not surprisingly, most associations offer single and joint memberships. Joint memberships are available to two-alumni households or those in which an alum and a non-alum wish to show their joint support for the association.

Associate memberships also are popular. Associate members typically are individuals who never attended the institution—parents of students, faculty, staff, or donors and other friends of the university. Associate members may not receive the same benefits as more traditional members and typically are ineligible to vote on alumni association matters or to hold office in the organization.

Complimentary or gift memberships have become commonplace over the years. Many associations provide graduating students with one year of free or discounted membership in the hope of retaining them as paying members when the first year expires. Honorary memberships are sometimes used to recognize close friends of the institution, honorary degree recipients, or retiring faculty members.

Several creative types of memberships have been implemented from time to time—some more successfully than others. Three-year memberships, decade memberships, gradually-increasing-in-cost memberships, senior citizen memberships, and even newborns-of-alumni memberships have been offered. Two of the more successful categories in recent years have been "sustaining life memberships" and "donor associate memberships."

Sustaining life memberships are directed toward fully paid life members. Some associations have recognized that certain alumni joined when life memberships were extremely inexpensive; these alumni had enjoyed the benefits of membership for many decades, while the costs for providing those services had skyrocketed. To become a sustaining member, a paid life member could make a voluntary additional payment to help offset those costs. The additional payment usually does not provide additional benefits—thus making the voluntary payment tax deductible. Clearly, when you implement such a program, you should be careful to explore fully any tax implications that might affect the alum.

The donor associate membership is a relatively new concept. It provides benefits to alumni or friends who are donors to the institution but not members of the alumni association. Again, tax considerations are important because benefits and services from an association membership can reduce the tax-deductible amount of one's gift.

This program can be beneficial from several perspectives. Many alumni believe that they automatically become members of the alumni association when they make a financial gift to the university; others believe they are making a gift when they purchase a membership to the association. The donor associate membership helps eliminate much of that confusion. The donor also derives benefits from supporting the institution that he or she otherwise would not have. Receiving the alumni publication, invitations to campus events and programs, and communications from the university bolster an existing relationship between the donor and the institution. The donor associate membership concept also reduces the number of solicitations donors receive; once the donor receives this designation, he or she is taken off the list to receive direct mail and telemarketing solicitations for regular membership. The association saves precious dollars because it does not have to print, mail, and administer such solicitations.

ADVANTAGES OF MEMBERSHIP

Membership can be a self-selecting indicator of an individual's support for his or her alma mater. It also can establish regular contact with those who have expressed their loyalty, and it can generate a stream of revenue that can support the operations of the organization.

There are other advantages as well. Printing and postage expenses usually are among the largest line items in an alumni organization's budget; membership can better control those costs by enabling the association to send mailings only to those

who have paid for the benefit. Membership is particularly cost-effective at institutions with extremely large alumni bodies.

Membership growth, or decline, can serve as one of many standards for gauging an association's success (or lack thereof). In a profession in which attainment and accomplishment are very difficult to pinpoint and define, membership can be used as one of many mechanisms to evaluate the organization.

Some associations claim that membership programs benefit the university's development and fund-raising efforts. These organizations can demonstrate that a significantly high percentage of members are also donors to the institution and that nonmembers are much less likely to be givers. Common sense certainly would indicate that, over a long period of time, alumni who are well-informed and have received regular communications are more likely to lend their support than those with whom the institution has not kept in touch. In many cases, membership is the program that initiates that communication.

DISADVANTAGES OF MEMBERSHIP

Membership doesn't necessarily fit in every situation, however, and many alumni organizations have been immensely successful for decades (or longer) without it. Membership programs can create dilemmas or even prove disadvantageous in some circumstances.

By its very existence and definition, membership inhibits periodic communication with all alumni of an institution. Although most institutions typically will send at least one annual mailing to all alumni, a membership-based alumni program rarely communicates with all alumni the same way it communicates with its members. Nor should it; doing so would reduce or negate the value of membership.

Although a large percentage of members may be donors to an institution, many alumni donors are confused by the notion of membership. When an individual makes a gift to his or her school, he or she does not expect to make an additional commitment to be recognized as a "member" of that community. Moreover, many donors believe that by paying dues to join their alumni association they are, in fact, making a gift to their alma mater.

Membership solicitations can create problems of coordination as well. Most external relations units believe that solicitations for gifts and memberships are seasonal and can create competition for the alumni dollar if not well orchestrated. Coordination certainly is one solution; others include not offering a membership

program, not offering an annual giving program, or housing the annual giving program in the alumni office.

Membership programs also can create internal difficulties for the association. When the association organizes outreach programs far from campus (as in alumni club programs), should it invite members only? Or is it more important to increase attendance by inviting all alumni living in the area? Do alumni members want only fellow members to be invited to a function (because they have paid for the benefit), or do they prefer to meet other, nonmember, alumni who happen to live in their community? This issue can be raised with regard to virtually every program an alumni organization offers, from constituent activities to reunions to Homecoming.

Clearly, membership programs can provide major benefits of communication, involvement, and opportunity. They also can be limiting and confusing and create internal competition and difficulty. Alumni associations should be mindful of the advantages and the disadvantages of membership when they establish, expand, or even eliminate such programs.

RECRUITING AND RETAINING MEMBERS

Once you understand some of the reasons alumni choose to join a particular alumni association, determine the types of memberships you will offer, ensure that you will be providing members with good value, and decide how to interact with members and distinguish between services offered to members and those offered to nonmembers, your battle has just begun! Now the challenge is to get—and keep—a sufficient number of members to sustain the program. Fortunately, a variety of methods have proven successful for most alumni organizations.

Direct Mail

The mass mailing probably is the most frequently used tool for soliciting members. Organizations experienced in this method know that they must be direct, efficient, and to the point with their messages. Few consumers take the time to thoroughly review every piece of mail they receive. The fact that a solicitation is from their alma mater may or may not encourage them to open it and respond.

Well-prepared direct mail can be a valuable communications tool as well as a useful solicitation strategy. Many graduates complain that they never hear from their institution—or that they hear from the institution only if it wants money. Direct mail pieces can incorporate a message from the president or chancellor or provide an update from the university.

Direct mail is relatively inexpensive and can yield a response that will easily cover the cost of producing the piece, although the average response rate to such mailings usually is less than 2 percent.

Targeted Mail

Today's databases permit much more sophisticated and focused mailings. Using demographic, geographic, and personal information in tandem with targeted mailings, you can expect higher returns on your investment. Why not discontinue mailing to alumni who have indicated extreme dissatisfaction with the institution or the alumni association? Perhaps an individual needs personal attention that a mass mailing cannot provide. Conversely, an alum who expresses an interest in volunteering, actively participates in a constituent group or affinity program, or is a season ticket holder may be a prime candidate to target for membership.

Telemarketing

Some associations achieve great success by telephoning alumni. Prepared scripts can encourage membership while they update the listener on issues of importance concerning the campus. Student callers can be especially effective at relating the "feel" of being a student on campus today. Professional telemarketing firms also are quite effective. Typically, you can expect professional callers to yield a greater response, but student callers are more likely to "connect" with alumni. Alumni may view professional callers no differently from any telemarketer, but students and alumni have a special bond. Telemarketing can yield significant results but is usually more expensive than mail.

Electronic Commerce

An as-yet-unknown commodity, electronic commerce (or "e-commerce") holds great promise for the future. Alumni who are technologically adept will find joining an alumni association online especially convenient and simple. Forward-thinking organizations are making membership benefits, services, and programs available electronically as well.

Personal Contact

As high-tech as record keeping and membership have become and may continue to become, alumni relations is still a relationship-building profession, and there is no substitute for the personal touch. Well-informed, personable, and helpful staff

members and volunteers will always yield better results than the most perfectly crafted solicitation. Providing competent, personal service—in the office, at an alumni function, or somewhere totally unrelated—should be the alumni association's top priority.

CONCLUSION

This chapter has examined several issues related to membership: reasons that alumni join an association; typical types and categories of membership; factors in support of membership programs, and problems that such programs can cause; and tried-and-true methods for obtaining members.

Membership programs can be much more elaborate and complicated, however, than this brief overview suggests. If you are interested in learning more, consult experienced membership officers, observe successful programs, and learn from related kinds of organizations.

Membership remains an important building block for associations that choose to offer it. As it has for decades, it continues to be an important tool in helping organizations achieve their goals. Be mindful, however, that no matter how sophisticated a database is, no matter how professionally done promotional materials are, no matter how many benefits an organization provides, membership is still built one individual at a time. You must develop a cadre of friends devoted to their institution and the alumni association. One-on-one, personal contact remains the best way to build a successful membership program.

13

REUNIONS

Dan White

PRINCETON UNIVERSITY

It's safe to say that reunions are a vital component of any successful alumni relations program. Reunions attract alumni to campus, but they also drive alumni activity and engender good feelings about the university. This chapter focuses only on class reunions. Keep in mind, however, that many institutions now hold reunions by affinity groups and other appropriate gatherings.

Here's how the process works: Alumni come back to reunions, where they have a good time and feel good about one another and about the institution. They renew ties with classmates and make new friends with those they didn't know during their time on campus. In this manner, they revitalize the class and thereby strengthen and extend its life as a vibrant organization. This process of renewal can occur every time a class holds a reunion—even when the class has become quite old. If a good class structure is in place, that structure will capture the energy created by a reunion; if not, the energy of reunions will dissipate, and there will be vastly reduced benefits to the class over the long term. Even worse, when the time comes to plan the next major reunion, someone will have to start all over.

The main purpose of a class should be to plan its five-year reunion, and the main purpose of a reunion should be to provide a way for the class to celebrate itself and its membership in that greater whole—the university. Five years between reunions? A strong class starts planning its next reunion almost as soon as it finishes its last. In fact, there is no reason why alumni shouldn't be encouraged to return every year. Through a system of satellite classes, it's possible to accommodate the small number of hard-core reunioners who do like to come back every year.

A successful reunion—like all other events and activities—requires careful planning that begins well in advance and involves a large number of classmates in the

process. Although planning this way is a bit sloppier and more cumbersome than other methods, involving a lot of people in the planning process is a sure way to get them invested in the reunion itself. Involving so many people in planning also has an important ripple effect: Each of them has a circle of friends within the class who will feel the "vibes" given off by the planners and catch their "reunion fever."

The main goal of a reunion should be to bring back to campus as many alumni as possible, maximize the opportunity they will have to visit each other and the university, and minimize—if not avoid—aspects that drive up costs and sometimes get in the way of the larger purposes. A reunion class should be encouraged and entrusted to plan its own reunion, with guidance from the alumni relations staff.

More specifically, to enhance attendance, the reunion has to appeal to alumni with families as well as those without, depending on the age of the reunion class. It also has to appeal broadly (i.e., offer something for everyone). Much of the "core" programming should be done by the alumni relations staff as it seeks to plan activities and events of broad interest to all reunion attendees—programs that do not compete with individual class activities and supplement and enhance their schedules. Yet each reunion class should have programs unique to the class that draw attention to the class itself.

Providing maximum opportunity for classmates to visit each other means just that: Reunion programs should be set up to encourage many class-together activities. Events such as receptions and dinners shouldn't be rushed or truncated by entertainment or meetings. Reunion chairs should resist the notion that they have to entertain their classmates every minute of the reunion period. Sit- and stand-around time are vital to the business of renewing friendships—which is, after all, the main reason alumni come to reunions.

ALUMNI PERCEPTIONS

This is an appropriate place to muse briefly on the question of why alumni come back—or do not come back, as is often the case. To begin with the negative: Some alumni think reunions are frivolous, incidental to their experience at college, and not a necessary part of their current lives. Some regard reunions as parties for the successful—alumni whose careers meet commonly accepted social norms of success (president of a company, big salary, etc.). To other alumni, a reunion is a "club" for the inside crowd—people who bear the stamp of approval from the institution because of the perception that they contribute generously to the school—or have the potential to do so.

Some alumni think reunions are all about fund raising—that a reunion is a thinly disguised attempt to get alumni in the mood to donate money. It's likely that the most common reason alumni do not come back is unstated: Alumni either did not enjoy their college experience or, in their own estimation, have not been "successful" since college. Whatever the reasons, a certain group of alumni will never participate in a reunion. Happily, they represent a small number; although a hard-working reunion planner never stops trying to get them to come back for at least one reunion, the reunion planner should concentrate on attracting people who are likely, for one reason or another, to return to campus.

Why are some alumni more likely to return? Although there may be as many reasons as there are alumni, a few general possibilities stand out. In a larger context, reunions and other similar celebrations are rites of intensification. They are occasions for alumni to strengthen their feelings of loyalty and their willingness to identify with institutional purposes and needs. Alumni have in common the fact that they value higher education. The reason they return may be as simple as the desire to express once again their commitment to higher education by participating in a larger whole, in the institution itself again, albeit briefly. At reunions, alumni see that their alma mater transcends them and, for whatever reasons, desire to help perpetuate the spirit they feel and the institution itself. To state the obvious, these feelings are conducive to enhanced affection for the institution and all that can result from those feelings.

In certain respects, too, reunions elevate the institution to the status of shrine. Alumni take their families on tours of the campus and point out memorable places like their dorm room, the football stadium, or the library. When an alum responds favorably to a reunion mailing, he or she signs up with a band of classmates for a journey that Victor Turner, in *Dramas, Fields And Metaphors: Symbolic Action In Human Society,* describes as a pilgrimage to the shrine. A pilgrimage temporarily liberates its participants from everyday constraints; thus, the alum sheds his or her normal role and social status. He or she may even leave spouse and family at home and re-enter a place where role and status are violated and satirized.

A reunion is a passage back to the alum's youth. Prominent alumni—judges, company presidents, politicians—once were college students just like everyone else. At reunions, alumni become equal again and feel a solidarity they seldom experience on such a scale elsewhere in society.

Reunions also are festive. Harvey Cox's *Feast Of Fools: A Theological Essay On Festivity And Fantasy* defines the essential elements of such festivity: There must be conscious excess, a celebrative affirmation of life, and juxtaposition of fantasy and

reality. Most of our reunions are organized accordingly! Returning alumni remember their college years as full of promise and beauty and excitement. These memories may contrast with the reality of the present world. A reunion is a moment of inertia between two movements in opposite directions, temporarily suspended. Alumni return from the world they inhabit for a brief visit to their past, and the act of remembering the past provides a context for the present and the future. This remembering is the fantasy of reunions—and perhaps their best excuse for being.

REUNION PLANNING

Reunions do not just spring into being, of course. They require careful planning, and there are many schemes for organizing a reunion. Before you choose one, however, you must decide to what extent a professional alumni relations staff should plan reunions for alumni (if at all).

For a reunion to achieve maximum success—and provide the maximum benefit to the institution and alumni—volunteers have to play a major role in planning their own reunions. They have to take responsibility for their reunion. Therein lies the challenge: How can the staff trust the class to plan the reunion the way the staff members want it? The answer is, They can—and they can't. The staff can improve the chances of a successful reunion by informing the class early in its planning process what the class can expect by way of support from the staff and what the institution's policies are with respect to their use of campus facilities. The staff also can compile records and information from past reunions, which can be helpful in planning future reunions, and train the reunion chairs.

At some point, there has to be a trustful relationship between staff members and volunteers. Staff members have to realize that they can't ask alumni to volunteer without giving the alumni real responsibility—which means real decision-making power. When alumni think of reunions as their own, they will invest in them in a way that will pay huge dividends for the class and, ultimately, the institution. When alumni invest their own time and energy, they generally feel more pride and responsibility for making the reunion work successfully. In a staff-driven planning effort, the staff can throw a nice party that will leave alumni feeling appreciative. If one of your goals is to develop a strong, sustainable volunteer organization, however, you can best accomplish that goal by mobilizing a corps of volunteers and turning them loose on the planning—within the guidelines of the institution and with support from the staff.

The key person in a successful reunion planning effort is the president of the

class. The class president is responsible for selecting a reunion chair to oversee the planning of the reunion. A good class leader will keep informed about reunion plans and provide support and accountability.

The reunion chair should always feel a certain obligation to the class leadership and to classmates to have the best possible reunion. The ideal reunion chair loves the class and the university, can manage a large number of people and projects, and can roll up his or her sleeves and get down and dirty with the reunion committee when necessary. Serving as overall reunion chair is a big job, but the rewards for the individual, the class, and the university are potentially enormous.

The reunion chair's first job is to appoint good people to chair the committees that must be organized to handle all aspects of reunion planning. It helps if these volunteers live close to the campus and are representative of the broad spectrum of interests in the class (including non-alumni spouses). Most important, these committee chairs must be dependable workers, or the reunion chair will end up doing more than one job.

Reunion Committees

Publicity and Promotion. A publicity and promotion committee coordinates the production of promotional mailings and uses university mailings as well, including the alumni magazine. This committee creates a theme and a marketing plan to boost attendance. It establishes a regional network of classmates to encourage attendance through personal contact and area telethons.

Attendance. An attendance committee is dedicated strictly to getting the highest attendance and to brainstorming how that might best be done. The staff might consider establishing attendance awards for classes.

Finance. A finance committee prepares the budget, handles all financial transactions, and keeps the books. Reunions can be expensive...and ruinous to a class's financial well-being. The finance committee completes the post-reunion financial report and files it with the staff for future reference. Keeping in mind the essential purpose of a reunion, and remembering that you don't want to push it too far, the reunion committee should seek to minimize or avoid items that drive up costs and get passed on as fees to returning alumni. Fancy meals, big-name bands, and elaborate details such as valet parking may seem to add some glitter to the attraction of a reunion, but alumni do not make their decision to attend reunions, evaluate their experience at reunions, or treasure their time at reunions because they had a gourmet meal, heard a rock star, or drank expensive wine at a reception. They come to see their

friends and to immerse themselves in the life of the campus at a place they value—a place they associate with their "golden" youth (however golden it was or wasn't). Nothing else matters as much.

Headquarters. A headquarters committee coordinates with the person in charge of food to order tables and chairs and makes other arrangements for meals. This committee attends to the details of the headquarters site: the placement of the registration table, tents (if necessary or desired), lights, dance floors, bars, and so forth. It also plans a secure system for registering guests.

Housing. A housing committee reserves off-campus spaces at local hotels a year in advance, receives advance registrations, and maintains attendance records—including spouses/guests and children—for food counts, housing allocation, and attendance award verification. This committee also orders and assigns on-campus spaces to classmates and coordinates registration, student workers, and others involved in the housing process, including preparation and clean-up.

Food and Beverages. A food and beverages committee arranges meals throughout the reunion program, notifies the staff and the university food services department of preferred locations on and off campus, and coordinates the ordering of tables and chairs for all meals. This committee negotiates with local distributors and retailers to order and dispense beverages. It also plans a system that follows state laws and university policies regarding the safe and secure dissemination of alcohol beverages.

Parade. A parade committee may be involved as well. If you don't have an alumni parade, consider starting one. Watching the alumni march class by class can be a poignant experience for marchers and spectators alike, the peak emotional experience of the reunions period. For a few brief moments, all of the alumni come together to march in a procession, from oldest to youngest, that symbolically captures the history of the institution and the passage of time. A parade committee will coordinate the class's participation in the march, hire a marching band, arrange class banner carriers, and provide appropriate signs for the marchers to carry—often signs that poke fun at society, satirize some public figure, or evoke memories of the past; needless to say, all signs must be scrutinized before the march to be sure they are in good taste.

Program. A program committee plans programs and special events such as tours, class forums, and athletic activities that will serve the diverse interests of classmates and their families. The program also may include a short community service project. For example, a reunion class might encourage each of its classmates to

bring a book or two to donate to a charity. This committee should work closely with the child care coordinator, if applicable; arrange for entertainment bands and singing groups; and coordinate the design and printing of the program.

Yearbook. A yearbook committee—usually headed by a professional editor or writer—develops the format and budget at least 18 months in advance, designs the survey that is sent to each classmate, receives and collates all of the material, coordinates advertising (if there is any), and arranges for publication. This committee also oversees distribution of the book, which should occur before the reunion so it can provide further incentive to return to the reunion.

There may be additional committees, or fewer committees, depending on individual situations and needs. The point is that planning a reunion should itself be an event that involves a large number of people who are representative of the class's diversity.

Staff Responsibilities

What is the role of the staff in reunion planning? The staff maintains files regarding past reunion attendance, finances, and arrangements. These files are invaluable as guides in helping reunion chairs plan realistic reunions. They also serve as subtle reminders of what is possible and what is not. Most reunion chairs don't want to reinvent the wheel and are happy to have the benefit of experience—as long as they can stamp their own signature on the reunion with some sort of creative touch or addition. The staff should welcome such creative thinking, which invigorates reunion planning.

The staff publishes periodic reunion bulletins or newsletters throughout the year leading up to the reunion, to update committee chairs as well as employees who will be involved in reunion support. The staff also compiles and publishes an annual handbook for reunion chairs, which should contain everything from A to Z about how to plan a reunion.

The staff serves as the reunion promoter and liaison with other campus offices. The success of a reunion depends as much on the institution as it does on the class, and the staff determines the level of that success. Ideally, the school's many offices work on reunions as a unified team, at least in spirit. Offices involved in reunions—such as dining services, events, facilities, grounds and buildings—must believe they are part of a team and that each has an integral role in making reunions work. The alumni staff should convene information and policy meetings throughout the year; these meetings go a long way toward building the right spirit.

Reunions represent an unsurpassable opportunity to build stronger alumni relations. The key is to involve as much of the entire campus community as possible—from the president of the institution to the faculty. Again, the staff is the agent for helping to make this collaboration happen, starting with its role as chief liaison between the reunion class and campus offices involved in providing reunion services. At the very least, there should be some system for inviting faculty and staff members to reunions, as long as it doesn't overload the classes.

There also should be a system of recognition and reward by the institution. Classes that have outstanding reunions should be recognized and their leaders rewarded with some small token of the school's appreciation for their leadership and accomplishment. The institution's president should be involved in such recognition; a simple acknowledgement and thank-you addressed to the class during its reunion can go a long way toward expressing gratitude and elevating reunions in importance by demonstrating that the campus' top leadership is involved. A reunion also is an important time for the president to be out and about. Scheduled visits to the major reunion classes to mix and mingle, or make brief scheduled remarks, are a great way to increase the president's visibility and more intimately involve the institution. When the reunion is over, the alumni relations staff might host a celebratory picnic to thank all of its teammates.

The staff schedules meetings for the committee chairs throughout the year to discuss issues and deliver information, all for the purpose of providing reinforcement for all reunion planners. This aspect of the staff's efforts creates a sense among reunion planners that they are part of a larger team and their efforts have global aspects.

The staff publishes the official reunion schedule and coordinates campus space use. The staff develops and administers an alumni-faculty forum program—a series of panels of alumni experts on a particular topic, moderated by faculty members, which are designed to provide a real intellectual kernel to the reunion. Every major reunion class should have representatives on these panels. A class may organize its own panel without any assistance from the staff, but there has to be some coordination with the staff to avoid conflict either in scheduling or in the recruiting of faculty moderators.

The staff oversees the distribution of headquarters spaces to ensure that one class does not get the same space reunion after reunion. It's important to have a campus location that fits the class, but it also is important to move a class around the campus over its lifetime so that it can see how the campus is changing—as well as allow other classes to use a particular space. At Princeton University, the 25th is still considered the premier reunion class, followed by the 50th and the Old Guard (which generally is

defined as 66th reunion and older). People are living longer and healthier lives; many classes already are celebrating major reunions well past their 50th.

The staff also reserves non-headquarters facilities for classes. For example, a class may desire the use of a campus room to hold a class meeting. During reunions, the staff provides campus shuttle service (if appropriate) to help alumni arrive and depart from their headquarters, to minimize conflicts between drinking and driving, and to reduce traffic on campus. The staff coordinates a centralized child care system. Whether it chooses to organize and run such a program depends entirely on resources; most alumni relations offices do not have such resources. In that case, the staff may contract with a local YWCA or other organization to run the service.

A committee of volunteers with reunion experience, working closely with the staff, can play important advisory and oversight roles in the overall success of a reunion. This committee's most important role may be troubleshooting. Each member of the committee is assigned a major reunion class to track, starting at least one year before its reunion. The committee member should contact that class's reunion chair by telephone periodically to determine reunion planning progress. If a class falls behind in its reunion planning, the committee is alerted and can provide support and added pressure (if necessary) to help the class get going. Finally, in instances in which policy issues develop, the committee can be a powerful agent in discussing and enacting new policies. An alumni board committee on reunions is another meaningful way to involve alumni volunteers.

TIMING IS EVERYTHING

Once all the parts are in place, the next step is to get going in a timely manner. Planning for a major reunion should begin at least one year in advance—on the theory that volunteers always need extra time. A sample planning timeline is shown in Figure 13-1.

The president of the class should be visible in the planning process and in regular communication with the reunion chair, making certain that planning is proceeding on schedule. The reunion chair should convene all committee chairs periodically in a series of to-the-point meetings in which each committee chair provides a progress report. Most of the planning work can be decentralized, with each committee meeting on its own on an as-needed basis. Convening all planners occasionally in a meeting that combines business with some sort of fun event also is helpful—and good for morale. The reunion chair may wish to take minutes of meetings and circulate them

Figure 13-1. Sample Reunion Planning Timeline

The following schedule is based on the assumption that reunion planning will begin one year before your reunion event(s) take place. This is the ideal time schedule for planning a reunion, but, in many instances, reunion planning does not begin that early. If your committee gets a late start, do not worry; the schedule below can be adapted to fit most timelines.

1 YEAR BEFORE THE REUNION:

- Establish a reunion committee.
- Select the date(s).
- Publish reunion dates.
- Determine your targeted audience and draw up a preliminary guest list.
- Select and reserve a facility (facilities) for your reunion.
- Reserve special equipment such as vans, buses, tables, chairs, tents, and podiums.
- Reserve audio-visual equipment.
- Hire a photographer.
- Determine budget and per person cost.
- Reserve a block of (hotel) rooms for out-of-town guests, if needed.
- Get all necessary administrative approvals.
- Plan promotion and publicity of event.
- Mail an official announcement to all reunion class members.*

6 MONTHS BEFORE THE REUNION:

- Audition entertainers.
- Confirm an emcee and the program speakers
- Contact class participants and supply suggestions for their remarks; gather their biographical information; request photos of each participant for publicity/programs; confirm A/V needs, etc.
- Make preliminary security arrangements, if necessary.
- Plan printed invitations/brochures and all other printed materials, such as programs.
- Finalize guest list.
- Select menus.
- Keep campus officials, deans, and staff members informed of your plans and ask for their support.
- Plan the decorations and color scheme. Order props, special napkins, food or other usual needs.
- Schedule a phonathon to spark interest in the reunion.
- Send follow-up reports to class members detailing committee progress, response to date, exciting things to look forward to, etc.

3 MONTHS BEFORE THE REUNION:

- Select and order recognition items and get them engraved.
- Order favors, souvenirs, printed folders, and other give-away items.
- Print tickets and parking permits, if needed.
- Confirm entertainment bookings and photographer.
- Finalize A/V requests.
- Meet with florist, caterer, etc.
- Update security on your plans.
- Print invitations and set a mailing date.
- Secure hosts and hostesses and other university representatives to assist with reunion details.
- Continue publicity on schedule.

2 MONTHS BEFORE THE REUNION

- Mail out final program information and registration forms.
- Finalize decorations and facility arrangements.
- Make hotel and transportation arrangements for out-of-town dignitaries.
- Mail itinerary to dignitaries; include a reminder about expectations and speaking engagements.
- Double-check the extra help that will be needed including valets, coatroom attendants, and greeters.
- Make direction and welcome signs.
- Write and print the program and menu cards (if needed).
- Check that any ceremonial items such as flags, banners, medals, toasting goblets, and the like can be located and that all are clean and in good repair.
- Check that flagpoles and stands are in working condition, and that easels for displaying awards and seating charts are available and work properly.
- Inspect facility and request repairs to hazards that could cause an accident such as loose edges on stairs and upturned edges on carpeting.
- Continue publicity on schedule.

Courtesy of State University of New York at Buffalo, Office of Alumni Relations

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1 MONTH BEFORE THE REUNION:

- Get placecards lettered for all guests, and begin nametags.
- Record and acknowledge RSVPs as they are received; send out tickets, parking permits, and maps.
- Double-check publicity progress. Revise and update plans if necessary.

2 WEEKS BEFORE THE REUNION:

- Ask the grounds department to schedule a crew to mow and trim the grounds of the facility the day before your event.
- Take delivery of all printed materials.
- Stuff registration packets, if needed.
- If your event is taking place in another city, ship printed materials and other items to the reunion site. Call your contact person and ask how to label the shipment so that it will be accepted.
- Send detailed final instructions to all dignitaries with all tickets, parking permits, and maps. Supply them with the names and phone numbers of university officials and other VIPs who will be attending.
- Notify the caterer if the count seems to be significantly lower or higher than previously discussed.
- Write speeches and introductions.
- Take delivery on favors and mementos; double-check amounts.
- Get table numbers made.
- Enlarge a diagram of the room to be used as a seating chart.
- Have a final meeting with security.
- Check in with the florist, photographer, and caterer; send reminder cards to entertainers and volunteers.
- Schedule delivery times for special equipment such as tables, audio-visual equipment, and props.
- Work on final publicity arrangements.

1 WEEK BEFORE THE REUNION:

- Ascertain the intentions of anyone who has not yet sent an RSVP.
- Print out the guest list in alphabetical order.
- Finish placecards and nametags for all guests.
- Make the seating chart.
- Brief the hosts and hostesses, greeters, and VIP escorts.
- Gather all presentation items such as gifts, plaques, and trophies. Put everything in a convenient, secure place and put one person in charge of transporting them to the reunion site.
- Plan an arrival briefing for VIPs, if necessary.
- Call the office of invited university officials and double-check for last minute snags.
- Call security and double-check all arrangements. Provide them with final itineraries and VIP information.
- Send the guest list along with a final schedule of events to all involved academic officers and official hosts.
- Make catering guarantees.
- Have a car filled with gas, cleaned and placed on standby in case an emergency trip must be made to pick up a VIP or a forgotten item. Be certain the car has the appropriate parking permits for admission to university lots.
- Hold a quick volunteer "training" session—or create a tip sheet for all of your volunteers so that they are prepared for the big day.

REUNION DAY:

- Arrive early.
- Have with you all the clothing and accessories that you will need for the entire day in case there is not time to go home and change.
- Have all directions, phone numbers, keys, extra parking permits, seating charts, and guest lists with you.
- Check all facilities and grounds. Pick up litter, if necessary.
- Check a-v equipment to make sure that it is working properly.
- Check to see that the flowers, programs, etc. have arrived.
- Assign one worker to be your assistant. Have that person stick close to you to run errands, send messages, and be on call for whatever need may arise.
- Make sure that all volunteers know what is required of them.
- Relax and smile. Never tell "war stories" to your guests or intimate that things might be less than perfect. Chances are no one but you will notice any mistakes.

1 MONTH AFTER THE REUNION:

- Send out reunion directory of all participants and their memories.
- Send out thank you notes to committee members, key alumni leaders, campus personnel, etc.
- Pay for all expenses and reunion services.
- Compile and review evaluation results.

among committee chairs afterward. These meeting minutes serve as a useful reminder to volunteers of what they promised to do by the next meeting. Always, the goal in planning should be to respect the volunteer's time (by planning effective meetings) and to have fun. Otherwise, each meeting becomes just another in a life full of meetings for busy volunteers. Working for the institution in a volunteer capacity has to be rewarding and fun.

CONCLUSION

Reunions are part of the life experience. They represent unique and valuable opportunities to build stronger alumni relations. Returning alumni participate once again in the experience of being young. They are reminded of what the institution means to them, their feelings of pride nourished anew. For the reunion class, each reunion allows classmates to rebuild their bonds and forge new bonds with classmates they never knew on campus. The class is strengthened and revitalized, its life perpetuated. The class gains momentum from the good feeling generated by a reunion. That momentum can be captured by the class structure and used to fuel activities in the years between major reunions. The class should change leadership at reunions and install new faces as cl[illegible]officers, with fresh ideas and fresh energies, ready to carry the class to its next reunion fi[illegible]ars hence.

The institution also gains: The enhan[illegible]d good feeling invariably leads to success in fund raising. Reunions generate a certain co[illegible]petitive spirit that can be utilized in development efforts. Most of all, the school gains the good feeling of its former students. They leave having remembered, having reenacted (for a brief period), their membership in a larger body. For a few days, they relive their former lives. When reunions end, alumni return to their current lives. That withdrawal from the campus may be only temporary, however. If the reunion has gone well, they will be back.

14

COLLABORATIONS BETWEEN STUDENT AFFAIRS AND ALUMNI RELATIONS

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University of Connecticut

The students of today are the alumni of tomorrow. This obvious statement has vast implications with regard to the demographics of our students and the needs they bring with them as they move to alumni status. A major trend on campuses today is the redesign of programs and services to meet our students' needs. These changes have streamlined administrative procedures, created partnerships between traditionally isolated departments, and provided resources and staff in new ways to manage the student life needs of the campus. Success in the alumni field requires an understanding of student affairs and the potential synergy that exists for joint programs and services.

This chapter examines today's students and the needs they will bring with them as they become alumni; discusses several areas of advancement/alumni relations in which involving students can benefit the program or the institution; and provides an overview of successful programs and methods of interaction that bring together students and alumni in the work of institutional advancement. This review touches on alumni relations, fund raising, public relations, and government/community relations. All of these areas connect to the work of the alumni professional.

WHO ARE OUR STUDENTS?

College students are more diverse today than ever before. Only one in six of our undergraduates fits the traditional profile of an 18- to 22-year-old living on campus

and attending school full time. Today's students are older; many have families; most work at least part-time; and they come from a variety of racial, ethnic, and socioeconomic backgrounds. They are consumer-oriented: They want the college to provide them with a multitude of services at low cost and with efficiency. Those who live on campus want residences that are clean, safe, and often more connected to the academic program than in the past. A wide variety of theme dorms exists on campuses across the country: wellness, substance-free, honors, racial and ethnic floors, groupings by majors or even by sexuality. Many students choose to live in residences with people who are like them.

Many students prefer to socialize in small groups, such as student organizations. Splinter groups of every category, from vegetarians to traditional fraternities and sororities, have proliferated on most campuses. Students today question the authority of the administration as much as their predecessors did in the 1960s and 1970s—except that they are more cynical and disengaged. As a result, campus traditions are harder to develop or maintain. Many deans of students across the country decry the loss of the sense of "community." Campuses struggle to redefine general education requirements to include a core curriculum and to support the basic values of the college. Issues of political correctness dominate many campus interactions. The tension between groups of different backgrounds seems to bubble just beneath the surface, ready to explode at common misunderstandings.

What does this situation mean to the work of student affairs and alumni relations? Both areas of the campus administration need to be fully aware of the demographics of campus populations. Admissions, counseling, and residence life staff members tend to have more information on student groups and their needs; the alumni staff needs to try to work with those departments to get this information. Knowing about trends in student experience and satisfaction with campus life as undergraduates can help alumni staff plan their programs and services for the future. Knowing the current status of undergraduate life also helps the alumni staff in designing programs and services to connect with students while they are still in school.

ALUMNI PROGRAMS THAT INVOLVE UNDERGRADUATES

Most alumni programs involve students in a few traditional programs—primarily student alumni associations (SAAs) and career programs with alumni. SAAs can be a powerful and effective way to develop alliances with a large cross-section of the undergraduate population. The opportunity to develop leadership skills and to

network with alumni relations staff and alumni themselves often motivate student involvement. In addition, these students may become future leaders of the alumni association. Therefore, it is in the best interest of the institution to work with student associations to ensure that they represent all of the diverse groups within the student population. The student affairs staff can help identify particular students or student groups for that effort.

Student members of the association should undertake substantive tasks, instead of just assisting with routine responsibilities such as registration at Homecoming. A student association planning a week-long series of events for the opening of school can bring together a variety of programs and services that students need and create good publicity for the association. Involving the student association in a leadership conference with alumni—including students on a panel with key alumni, for example—allows students to share experiences and learn about leadership development. Including SAA officers in alumni association board meetings provides the alumni association with updates on campus life and offers students valuable learning through interactions with these important volunteers. By cultivating student association leaders and other active students, alumni staff can mold the alumni leaders of tomorrow.

Another area in which many alumni offices work with students is career services. Programs that involve alumni as mentors to undergraduates or offer shadowing opportunities in a particular field are usually successful. Working closely with the career services staff is essential. In addition, efforts to reach out to particular groups, such as African American students or women, might best be accomplished through student activity groups. Working with the theme dorms on campus to bring back alumni with a particular interest is another example of career networking. The development of online search capabilities makes connecting students and alumni with similar backgrounds and career objectives easier than ever before.

An often-overlooked area of collaboration with students in alumni programs is in student activities and leadership development efforts. Instead of holding separate leadership conferences for alumni leaders and student group leaders, why not combine the two efforts and have the two groups learn about specific skills together? A leadership conference that involves students, alumni, faculty members, and staff members will have far-reaching benefits to all groups.

On many campuses, student organizations are required to have a faculty or staff adviser or sponsor. Why not extend that invitation to alumni? Many alumni would enjoy informal interaction with students around a particular area of interest (e.g., the

outing club, the solar car club, the student-run co-op). Some of this advising could be done online. Working with the student activities office to identify areas of need for undergraduate students will benefit current undergraduates and help develop important connections that can be maintained after they graduate.

FUND RAISING

Many institutions have successfully involved students in fund raising through the school's telefund operation. This effort often entails having student groups compete for phone pledges or having students call alumni randomly asking for donations. As our institutions develop more sophisticated fund-raising campaigns—often with the use of outside consultants or increased development staffs on campus—we need to insert students into the fund-raising effort more directly. Students can get the information they need to interact with prominent alumni in small-group settings during the cultivation stage. Alumni consistently say they value interaction with current students; thus, the probability that a donor will be open to making a gift will increase if there is meaningful student contact with that donor. Involving students in demonstrations of current curriculum innovations or technology can help donors understand that their gift is having a valuable impact on real people.

Targeting specific student groups, such as members of fraternities or student athletes, has been a successful strategy on many campuses. Another way to involve students in fund raising is to tap into the large number of student activity groups organized by ethnicity, gender, religion, or other identifying factor. Having a specific funding goal, such as refurbishing of the student union, and targeting specific groups that use the student union with contacts from current students with similar backgrounds and interests will increase the probability of a gift. This effort can be undertaken in conjunction with the student activities staff.

The alumni staff should not overlook the importance to fund raising of increasing the "good will" of students from the moment they are accepted to the institution. Alumni need to be active in identifying problem areas they had as students and seeking changes for the future. For example, if during the first week on campus new students are shuffled from one office to the next, are not given efficient and friendly service, or are provided with substandard housing, their educational experience is off to a poor start. Alumni staff need to provide student affairs staff and other campus administrators with feedback from alumni surveys regarding satisfaction with student life programs and services. Alumni can be involved in campus committees that redesign facilities and services to meet the needs of students.

PUBLIC RELATIONS EFFORTS

Alumni offices often become involved in the institution's public relations efforts. Alumni staff members—working in conjunction with the public relations staff, the local media, and the student affairs staff—can help boost the local and national image of the institution. Alumni often are involved in the admissions process, interviewing students across the country and providing information about the school. Using current students to train alumni in those efforts is important. Marketing the school effectively requires that alumni have current information and knowledge about student life and culture.

The student affairs staff can assist the alumni staff in showcasing the talent of undergraduates. Providing interesting student life profiles in alumni publications or to the local and national media can enhance the image of the institution. Many institutions regularly provide the media with profiles of faculty members and current research they are conducting. Including information about students involved in research projects can make the article more interesting. Often, student affairs staff members living in the residence halls have the best knowledge about exciting projects and issues that would be of interest to the general population. When negative publicity results from a campus death or alcohol incident, the student affairs staff can assist in identifying articulate, compassionate students to talk with the media. Alumni staff should work with staff members in orientation and first-year programs to help students understand that their actions have an impact on the campus community.

GOVERNMENT AND COMMUNITY RELATIONS

Student affairs staff members are well aware of problems caused by students off campus, especially problems related to alcohol and neighbor relations. Most institutions have alumni who live in the area and are involved in the economic, social, and political fabric of the community. By connecting these alumni with student leaders on campus, the institution can educate students about their responsibilities as citizens. Students can be encouraged to get involved in local government and can be trained by alumni who are local or state government officials. Connecting with the off-campus or commuter population through the student group that represents them on campus is one avenue to reach these students. Using the student newspaper to discuss local and state events such as budget issues, financial aid, affirmative action, or elections is another way alumni can influence student involvement. Inviting alumni who are

experts in these areas to write articles for the student newspaper or be interviewed on the campus radio station provides needed information and education to students and another way to reach out to alumni.

The alumni staff should not overlook students when they work on legislative issues at the state or national level. Students are very effective at lobbying elected officials and can be coached by alumni who are in the legislative bodies. In addition, students can be articulate spokespersons in committee hearings and other public forums designed to educate others on current social and political issues. Students also can be effective candidates for elective office themselves. Connecting students running for political office with alumni who are in similar roles provides information and support to the students and a role-modeling activity for the alumni. Again, by connecting with the student affairs staff who work with student organizations and know individual students directly, alumni staff can make successful connections that will assist in the development of effective government and community relations for the college.

CONCLUSION

Some of the student affairs staff members on your campus probably attended your institution as undergraduates. Involving them directly in the alumni relations business can benefit your office greatly. Student affairs staff members are the eyes and ears of the campus in the residence halls, in the student center, and with student groups in a variety of settings. Collaborations between student affairs and alumni staff to provide more opportunities for student involvement have been growing in the past decade. Further efforts at working together, such as those described in this chapter, will enhance the overall alumni relations effort and may improve public relations and fund raising. In the future, viewing all undergraduate students as potential alumni leaders will effectively position the alumni office to connect in a multitude of ways with student life on campus.

15

SAA: STUDENT INVOLVEMENT IN THE ALUMNI PROFESSION

Keith E. Brant

UCLA Alumni Association

A greater return than equities, more secure than bonds—the greatest investment you can make in your advancement program is an investment in today's students. They are your alumni of tomorrow, and, with a little effort, they will be your institution's best advocates, star volunteers, and most consistent donors of the future. A student alumni association (SAA) is an ideal way to involve student volunteers in advancing the alumni association.

STRUCTURE AND FOCUS

What's in a Name?

Many alumni have asked, "Isn't SAA (student alumni association) an oxymoron? How can they be students and alumni? In fact, many professionals who work with students have wondered about the right name for their student advancement program. These programs have different names at different institutions: student alumni associations, student foundations, student ambassadors. What a student alumni association does on one campus, a student foundation may do on another campus. Yet even with similar names, no two programs are exactly alike. Each student advancement program reflects the particular and unique needs of the institution it serves. Although this book is intended for professionals in alumni relations, it is important to note that professionals who deal with student programs often work with colleagues in philanthropy, communications, admissions, and other departments on campus.

What's Your Mission?

As alumni professionals, we continually re-evaluate our work. Thus, the process of thinking about your SAA is virtually the same whether you are starting the SAA from scratch, reviving one, or advising a long-standing, successful organization. What is the role of your SAA on campus? It's important that you be clear about the mission and purpose of the student organization; otherwise, you will spin your wheels and step on the toes of other student groups. In developing your purpose, examine the needs of your alumni association and the campus. Where can you fill a gap? Is your campus short on student traditions? What a great role for your SAA: "to establish, promote, and preserve campus traditions." Does your campus lack student hosts? You may want to have an ambassadors group. Do you want to involve current students in new student recruitment? A group co-sponsored by the alumni and admissions offices may be appropriate.

Be sure to review any campus guidelines, policies, or long-standing traditions of student groups. Talk to your colleagues in the student affairs office. Talk to student government leaders, residence hall advisors, Greek system officers, and other student leaders.

Open or Closed?

A classic issue for an SAA and the alumni association that supports it is whether to have an open or selective organization or a combination of the two. An open SAA is one that any student can join. Most alumni organizations don't want to exclude anyone from participating; after all, we spend the rest of our students' lives trying to keep them involved with the institution as alumni. A selective or exclusive (sometimes called closed) organization requires students to apply for positions and then selects a certain number for membership in the organization. With this method, you can enlist only the best students for the organization, rejecting those who may not be able to contribute fully. You can also have the best of both worlds: Develop an application, interview, and selection process for officers and other key leaders, but keep the organization open to anyone who wants to be involved.

Membership

Some SAAs charge membership dues. Members receive benefits, services, privileges, and publications that other students may not. Usually, dues are inexpensive ($15-$20) and help support the organization's initiatives. Having an SAA dues program is a primer for dues-based alumni associations that will be soliciting members after

graduation. It's one way to get students in the habit of belonging to the membership organization.

Equally as important as knowing your purpose is finding the right students to achieve your objectives. Students join organizations for various reasons. You want students who fit the culture of your organization. For example, if you've given responsibility to the SAA to sponsor an event, then you want students who have the skills and interest to plan and implement events. If you're looking for students to recruit incoming students or give tours, you're looking for intelligent and personable role models. You have probably come to know students (and alumni) who prefer to be "figureheads" rather than "taskmasters," or vice versa. You don't want anyone in the wrong role.

Once you get the right students, work with them to create an organizational culture. Give them their own space, stationery, and computers. Offer your professional expertise and counsel, but allow them to create an identity. Teach them the history of the organization, and allow them to establish and perpetuate healthy internal traditions. Be sure that the alumni association can be proud to stand behind the image you create for your SAA. For example, if your SAA develops a reputation for being "a bunch of nerds" or "all Greek," that reputation could have a negative effect on student perceptions of the alumni association itself. Officers and committee members should have job descriptions so there are no misunderstandings about their roles.

Educate and Train

As with any volunteers, continual education, training, and orientation is essential. Communicate the organization's purposes, customs, and procedures. Officers should review previous programs, set annual goals, discuss timely issues, and get to know each other. Training topics might include preparing an agenda, recording minutes, running an effective meeting, resolving conflict, delegating, recruitment and interviewing, and dealing with diversity. Involve students in training other students. Although your student group may be sponsored by the alumni office, help them understand the big picture of advancement. Bring in staff from the alumni, development, and communications offices to talk about what they do. One of the best training vehicles is introducing students to SAAs at other colleges and universities.

It also is essential that your SAA leaders interact with your alumni leaders, formally and informally. Ideally, you will find ways for them to work together on projects or activities. If possible, allow the SAA president to sit on the alumni board. The alumni association leadership needs to recognize the importance of student

involvement, too. Put SAA members on association and campuswide committees. Students bring a valuable perspective to just about everything we do in alumni work.

PROGRAMS AND EVENTS

Programs and events vary greatly based on the needs of the campus and the purpose of the SAA. Your student organization might be involved with programs for prospective students, current students, alumni, parents, or other members of the campus or greater community. Have students and alumni professionals spend time brainstorming; you will be surprised by the ideas they develop. Before or after brainstorming, consider the criteria you will use to determine which ideas have the best potential. For example, you may be looking for a program that is not currently being done on campus, has a fund-raising component, and involves the greatest number of people. Alternatively, you may feel your next program should involve faculty members, be only for student leaders in their senior year, and be attractive to commuter students. If you can agree on the criteria, you will be more likely to develop a program for the right reasons.

The following subsections describe some general categories of programs that might fit your SAA agenda. These categories represent a sampling of the types of programs that many SAAs offer.

Programs for Prospective Students

Many SAAs provide tours for future students. Who better to provide an insider's perspective to next year's freshman class than today's best students? SAA members often travel to high schools to talk to prospective students or host programs on campus for groups of visiting precollege students. Some institutions also have SAA members call admitted students to address questions the admittees may have in deciding which institutions to attend.

Programs for Parents and Siblings

Several SAAs sponsor parents weekends or "little sibling" weekends on campus. These events provide another way for SAA members to play the role of campus hosts and ambassadors. Whether your SAA plans the parents program or just participates in an assigned role, parents love to interact with students when they visit campus.

Programs for Seniors

Alumni associations often utilize the senior year as a time of transition, beginning to prepare students for when they become alumni. Involve your SAA in planning and implementing senior programs. Many SAAs have a senior class committee that sponsors receptions, parties, and events. How might a senior week of activities draw attention to your alumni association? Senior class committees often work with the development office to select and raise funds for a senior class gift.

Career Programs

One of the best ways to increase your involvement with students is to offer career programs. Alumni associations offer students a critical link to their future through your alumni network. Many SAAs sponsor career programs and workshops that provide high visibility for the SAA and the alumni association and create opportunities for students and alumni interaction. For example, your SAA committee might know many students who are interested in going on to law school; you might sponsor a workshop on careers in law that features a panel of alumni in different aspects of the legal profession. Alumni contribute best by talking about their personal and professional experiences. Have a current student or faculty member moderate the question-and-answer session, and leave plenty of time at the end for students to talk with alumni one-on-one.

Events and Traditions

Students involved in the SAA often are attracted predominantly to big events. Many SAAs help to plan and implement programs such as Homecoming activities, new student welcome programs, festivals, tournaments, banquets, and dinner programs. For example, some SAAs sponsor "Mudball" tournaments (in which participating campus teams play volleyball in the mud). Such events are great fun for participants and spectators and can be excellent fund-raising activities. Some SAAs sponsor programs such as "Dinner for 12 Strangers," whereby alumni host dinners in their homes for students and faculty members as a way to get to know each other.

STAFFING THE SAA

The Adviser's Role

Although you may consider students alumni-in-residence, they are very different from many alumni volunteers. Students are intense, inquisitive, idealistic, and very hands-

on. Because students are on campus frequently (if not daily) and are less experienced than most alumni, they often are "high maintenance" and require a great deal of guidance. Given ownership, however, they will adopt programs as their own.

The alumni professional who works most closely with the SAA is usually called the adviser. The job of SAA adviser comes with important responsibilities, interesting challenges, and enormous rewards. To SAA students, the adviser is the alumni association; in some cases, the adviser is the institution. The adviser must keep in mind that students' experiences in SAA activities help to shape their involvement as alumni.

The adviser's role is multifaceted. At one time or another, the adviser will be a cheerleader, parent, dictator, dishwasher, arbitrator, counselor, teacher, confidant, mentor, and protege. Be clear on the mission of your SAA, find good students, train them, give them responsibility and let them go at it!

Funding and Finances

Like many good alumni programs, your SAA will require a financial commitment from the alumni association. The budget will vary depending on the types of programming you offer. SAAs often sponsor fund-raising programs that may pay for themselves as well as raise additional money to support internal needs. Programs that have a participant fee may break even with no net cost to the alumni association. Don't overlook support from other offices on campus. For example, your admissions office might be willing to help fund student participation in recruitment. Other sources of funding for student organizations also may be available. Students should fully understand and participate in the financial matters of the SAA. Work with them to develop a budget so they understand the constraints, and allow them to find other partners to expand the SAA's resources. For example, students often are excellent at convincing local merchants to provide in-kind support.

After Students Graduate

As SAA members graduate, find ways to keep them involved with the alumni association. Former SAA members (especially officers) represent a unique group of alumni. They have a more comprehensive understanding of the alumni association than most alumni. If you have trained them well, they are prepared to become your best alumni volunteers. Some SAA leaders go on to graduate school after graduation, so they may not get involved with the alumni association immediately. Don't lose touch, however. These alumni will be a perfect group to involve in the future. Former SAA leaders have gone on to be club presidents and alumni association committee and board members.

Network Resources

Students and advancement professionals from across North America who are involved in student advancement work have gathered at an annual convention each summer since the 1970s. The convention often attracts 800 to 1,000 participants. This convention, in which the enthusiasm is contagious, is one of the best training tools available.

The Student Alumni Association/Student Foundation (SAA/SF) Network was formed in the early 1980s after many years of successful conferences. The network brings together student advancement leaders at the district level and throughout North America. The SAA/SF board, which includes student and professional representatives from the eight districts, develops policies and procedures for conventions (including site selection) and publishes materials to help institutions in all areas of student advancement programs. In 1991, the SAA/SF Network established a partnership with CASE. A student advancement associate selected by the network board manages SAA/SF Network operations from CASE's Washington, D.C., office. For further reading on student advancement programs, consult the CASE publication *Student Advancement Programs: Shaping Tomorrow's Alumni Leaders Today,* edited by Barbara Tipsord Todd (1993).

Remember: A strong student alumni association will help your institution today and is sure to help your alumni association tomorrow.

16

TECHNOLOGY IN ALUMNI RELATIONS

Andrew B. Shaindlin

Alumni Association of the University of Michigan

Imagine that you have volunteered to help a member of the physics department at your institution with a research project involving time travel. The experiment will land you at your desk in the alumni office 10 or 12 years in the future. Upon arrival, which of your responsibilities would you be prepared to assume with the preparation you have today?

Alumni board members might be recruited the same way they are today. Most likely, clubs and chapters will still be operating in local areas, and homecoming and reunion events might even be substantially the same.

In fact, chances are that your most daunting challenges in your future role will stem from adjusting to advances in technology: A synthesized voice will read your e-mail to you over the phone; you will hold alumni board meetings via desktop computer video conference; your alumni publications will have no existence outside their electronic format; alumni travel programs will take your graduates diving to the ocean floor. All of these possibilities are available to us at the end of the 20th century, yet they are anything but the norm. Still, they will be quite unremarkable in a few short years, and many more unpredicted developments will arrive to change the face of alumni relations and the public perception of institutions of higher education.

HOW WE GOT HERE

Until the early 1990s, alumni professionals (like employees in most nonscientific businesses) used technology exclusively or primarily as an internal tool. The real revolution caused by the development of cheap, ubiquitous, and rapid electronic

communications (such as e-mail and the World Wide Web) has been their application as tools for connecting alumni back to their alma mater. Traditionally, a club speaker might visit a chapter event once per year, and the alumni magazine might arrive monthly or quarterly. With the advent of e-mail and the Internet, however, alumni officers now have the opportunity to communicate with their constituents literally every day of the year. Moreover, the cost per contact is much lower than the cost of sending the speaker on the road or printing and mailing the magazine.

Because we are still in the earliest stages of applying these advances to our field, we can expect the road forward to be littered with the carcasses of unused and underappreciated applications of available technology. As we enter the 21st century, alumni offices here and there have abandoned (for now) live chats, audio lectures, and "push technologies" in search of greener electronic pastures.

KEEPING UP

Although alumni professionals cannot predict what lies just a few months down the road, they should establish the habit of monitoring the status quo in the world of technology and selecting from among current technologies the likeliest candidates to further enhance and change relationships with alumni. To paraphrase MIT's Marvin Minsky (the "father of artificial intelligence"), if you still believe something about technology after six months, you should immediately reject it; the rate of change is just too rapid for ideas to persist unchallenged longer than that.

You no longer need to read technical journals or computer trade periodicals to keep up with technological developments. The mainstream media cover this field daily, although information consumers must selectively pursue the stories that foreshadow "the next big thing." All alumni professionals (including vice presidents and executive directors) owe it to their institutions—and their alumni—to become comfortable with (and stay comfortable with) the buzzwords, jargon, and acronyms that come with the electronic territory.

STAFFING THE TECHNOLOGY ENTERPRISE

During the early years in which e-mail and the World Wide Web first became widely available in alumni offices and to the public (from 1990 to about 1997), alumni professionals were operating entirely on a "do-it-yourself" basis. Usually a junior staff member—frequently a recent graduate who had "grown up" with e-mail on campus

and couldn't understand why university staff were not using this powerful tool—would drive the conversations about, and implementation of, technological tools. Administrators considered such technology in the form of pilot projects, test cases, or experiments, in case the new technologies should prove to be useful.

Later in this period, when campus units realized they "needed" a Web site because alumni were asking for it, they turned to low-priced labor—in the form of students who could design, develop, and upload newly minted Web sites almost entirely on their own. The relegation of these responsibilities to whichever staff member or student happened to have an interest in them, combined with the feeling of experimentation inherent in a new program area, meant that high-ranking administrators regarded electronic communication as a "special project" or one-time experiment.

Unfortunately, this trend hid an important fact about our new endeavors: Online services for alumni and electronic communication represent a new, full-fledged program area that is here to stay, in one form or another. Though we can't predict what development will replace the Web in a few short years, we can safely assume that digital communications will continue to spread throughout our lives. Therefore, alumni offices need to provide these programs with the same staff and budget commitments they give to other, more traditional program areas.

Because of limited staffing, many alumni offices resort to hiring third-party vendors to develop and manage their online content. Using outside vendors frees the staff to handle existing programs. Unfortunately, this approach is an expensive proposition for the long-run because consultants can be hired only for finite periods. An online presence must be funded and staffed permanently—either through on-campus expertise (such as the central computing department) or through the creation of alumni staff positions that allow the alumni director to hire technically proficient professionals to perform this work.

$$$

Paying for the *delivery* of online services is another ongoing problem. Even offices that have made the commitment to hiring Web design companies (or vendors providing pre-packaged "online communities") often have failed to account for the permanence of this need. An online presence is not a temporary expense, nor is it a pilot project or an experiment. Online visibility and the delivery of electronic services have taken their place in the collection of "new traditional programs"—alongside career services and

professional development for alumni and programs created specifically for alumni with families, for example.

Even after accepting this additional financial burden, alumni offices may have to phase out some older traditional services or programs and perhaps convert some existing programs into an electronic format to free needed resources. There is no correct formula for solving this dilemma; each alumni director makes the decision based on his or her specific constraints, including budget trends, partnerships with technically equipped campus units, and, most important, the needs and desires of alumni themselves.

TREND WATCHING

Although technology itself remains unpredictable, alumni professionals should accustom themselves to reviewing the demographic trends that can guide decision making on the selection and uses of appropriate technologies. Relevant trends to watch include, for example, Internet usage among various age groups; what people do when they log on to the Internet (are they working? playing games? reading news? corresponding?); and, as Internet commerce gains mainstream acceptance and begins to challenge first mail order catalog businesses and eventually retail stores, where your graduates spend their money.

There are ever-changing but ever-increasing online resources for this kind of information. The most comprehensive monitor of Web usage, for example, is the twice-yearly survey of Web users conducted by Georgia Tech University (*www.gatech.edu*). Other research organizations conduct online surveys and track public usage of the Internet for personal and business use. You should consider all of these resources in broad general terms to help you decipher the trends that will affect your work. According to the Georgia Tech survey and Jupiter Communications, it is also important to remember that if you represent a college or university, the likelihood that a given constituent will be online is much higher than it is for the general adult public (three-quarters of whom do not hold bachelor's degrees).

EXAMPLES OF ONLINE SERVICES

What programs can you deliver online? The changing nature of the Internet, including the increasing speed at which alumni access it, means that possible uses continue to grow at a dazzling rate. By the late 1990s, university, college, and independent school

alumni offices had found many creative applications of the Internet for their work:

- School songs, including performances by campus musical groups
- Happy Birthday listings (interacts with database directly)
- Class Notes—more complete or up-to-date than the printed version
- A photo gallery (features of interest to alumni, such as campus construction or nostalgia)
- Virtual reunions (live or asynchronous)
- Trivia, Internet scavenger hunts, other games and contests
- Online education, such as mini-courses and book discussion groups
- Bulletin boards/forums/discussion groups—general or by special topic (athletics, class year, major or department, geographic region, volunteer activity, donor level, etc.)
- Secure financial transactions (dues payments, merchandise sales, ticket sales, reunion registration and payment)
- Live events—with or without audio (sports, lectures, Commencement)
- Searchable directories
- Silent auction for fund raising, such as scholarships; brick and tile sales
- Up-to-the-minute polling on campus or national headline issues
- Virtual postcards of campus for alumni to send to one another or for you to send alumni when they join your association online or register for an event
- Board and trustee nominations and elections
- "Alumni sightings" map
- Lost alumni locator
- Business card exchange
- Career mentoring and coaching networks
- Job postings service

Of course, the foregoing list is not comprehensive, nor will each of these features be useful to all institutions. This compilation can act as a catalyst, however, to spur your own office to more creative thinking about how to apply the available media.

As with all alumni programs, the most important thing to remember is that we must resist the urge to deliver something simply because we can. Rather, we need to query the alumni, read the trends, and decide what alumni actually want and need—and what we are in a position to deliver.

ELECTRONIC RESOURCES FOR ALUMNI PROFESSIONALS

CASE is a clearinghouse for information on our field, and electronic resources are no exception. In addition to offering professional development courses at a distance, CASE's Web site is the logical starting point for any alumni professional looking to further his or her knowledge of the field. Listservs (distributed e-mail discussion groups) are valuable sources of professional feedback and guidance, putting you in touch every day with peers who are willing to exchange information, experiences, and insights. Undoubtedly, as the interactive nature of the Internet and its cousins continues to increase, as-yet unanticipated electronic information exchanges will proliferate, making it easier and more rewarding to research and implement the electronic alumni programs of tomorrow.

SUMMARY

As electronic communication with our alumni became ubiquitous in the late 1990s, many long-time members of the profession warned, correctly, against an over-reliance on technology to solve some of the traditional problems of alumni relations. Furthermore, they argued, as we rely more heavily on communication at a distance we lose the benefit of face-to-face human interaction—the kind of interaction on which our profession was founded. Technology, they reminded their colleagues, is not the panacea for any of the problems facing the advancement profession.

Technology is not just a tool; it is really a tool box. If we select from the many options available to us a tool we can afford—and a tool we know how to use for the correct purpose—we can do our work more efficiently and serve a broader range of our constituents. As always, however, our expertise and experience in the business of alumni relations ensure that we do high quality work. If it is a poor craftsperson who blames the tools, then we can hardly blame the Internet for our own failure to connect with alumni on the terms they want or to provide them with benefits, services, and programs that they need.

Finally, one point is worth re-emphasizing: Technology is a program area. Online services are no longer an experiment; they are one of the program categories that our alumni—especially those who have matriculated since the Internet gained widespread popularity in the mid-1990s—expect us to provide. A permanent financial commitment, either to in-house development and support or some combination of in-house guidance and outside delivery of online services, should be the norm for every alumni relations office.

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WORKING WITH OTHER DEPARTMENTS

Janet C. Emery

Community College of Allegheny County Educational Foundation

In one way or another, our alumni are always with us. They represent our institutions regardless of the information they have or how connected they remain. Given these circumstances, it is in our institutions' best interests to open the door to alumni.

We open that door by providing opportunities to support the institution. By encouraging a two-way relationship with our alumni, we can ensure that everyone benefits. The institution continues to serve its one constant constituency. Alumni, in turn, are far more likely to support their alma mater.

In this chapter we will discuss the ways that the alumni relations office can work with other departments to best serve alumni, as well as how the whole institution can benefit from a healthy and active relationship with its alumni.

GOALS OF AN ALUMNI RELATIONS PROGRAM

Fostering good relationships with alumni meets the following goals of an alumni relations program:

- Informing alumni
- Establishing a two-way street
- Nurturing alumni concerns for the perceived value of their degree
- Providing alumni with opportunities for governance

Institutions see education as a lifelong pursuit. An alumni association helps its constituencies see education the same way. These efforts benefit the institution and the

employers of these alumni. We involve only one-half percent to one percent of our total alumni body in alumni leadership at any given time, however, so we need to provide a variety of opportunities for alumni to serve their alma mater.

CREATING OPPORTUNITIES FOR ALUMNI INVOLVEMENT

When you look for ways to fulfill the goals of your alumni association, look inward. Multiple opportunities exist for connecting and reconnecting alumni with the institution. Opening the doors to these opportunities will take time, effort, planning, and a good deal of tact on your part. Remember that relationships take time to build, especially when you are asking others within the institution to rework their departmental plans to include alumni. Be prepared to articulate the benefits that will accrue to their departments when approaching them about alumni involvement. You don't want to sound as though you're telling your colleagues how to do their jobs. Your goal is to build collegial trust and commitment through information-sharing and need articulation.

SUCCESS BEGINS AT THE TOP

All good professional relationships begin at the top. Thus, you need to have a good relationship with your CEO's office. Your president must understand and appreciate the benefits alumni bring to an institution. Once you have this relationship in place, your ability to succeed improves. For one thing, the president will actively encourage other departments to work with you. The CEO's own staff will understand that the alumni association's issues and challenges are a top priority. And the president will become available to you as a willing partner in successful alumni events.

The standard motto when meeting with the president to gain support is: Be prepared! Provide written documentation of the success others have experienced by making alumni an integral part of their institution.

DEPARTMENTAL RELATIONSHIPS THAT WORK

Alumni create a natural mix with current and prospective students. Relationships with departments that interact with these groups can and will positively affect recruitment and retention goals. The following subsections present some ideas for making these efforts work.

Recruitment

With training, alumni can provide an enthusiastic voice for the institution and a sympathetic ear for prospective students and families who find the selection of a college or university a confusing process. Alumni ambassadors can represent your institution at school fairs throughout the country and, in some cases, around the world. They can be part of on-campus recruitment activities such as tours and career nights. Recruit a large body of alumni to take personal responsibility for calling five to 10 prospective students in their area to discuss the admissions process and assist with financial aid questions. By working with the admissions director, you help him or her extend the reach of the admissions process while enhancing personalization.

Retention

Alumni can work with the offices of student life, dean of students, and career placement to assist with student retention. A host of such opportunities exist. Alumni can sponsor events on campus that attract and support students. Scholarships provided through the alumni association create a connection between current and future alumni. In cooperation with the office of student life, alumni might sponsor awards for intramural sports, homecoming events, or other traditional activities that occur on your campus. The dean of students may have individual students or special constituencies who would benefit from interaction with alumni who shared their experiences. The placement office can work with alumni to provide students with career advice and job opening leads. Depending on the size of your institution, such activities can take place on campus or throughout a wide geographic region. The important thing to remember is that you are creating links that will benefit everyone involved—now and in the future.

Alumni in the Classroom

Alumni can return to the classroom as students or guest speakers. In either case, they bring real-life experiences with them that enrich the educational process for everyone. You can promote continuing education classes provided by your institution to alumni. Consider special classes that bring alumni back to the campus for a week, or provide a unique learning experience elsewhere in the world.

Alumni can provide tremendous service as expert speakers in classrooms. Their presence and perspective help students relate the theories they study to applications needed in their future careers. Successful alumni are what students hope to be.

To begin the process of having alumni return to the classroom, you need to

contact the campus head (if you are in a multi-campus system) or academic deans. Together you can determine the classes and faculty who might work well with your alumni. Once you make these determinations, you can work with the campus head or deans to discuss the ideas with faculty. Be sure to listen to the faculty you approach. They will provide additional ideas that will enhance the effort. This process is a great way to build strong relationships with the academic side of your institution.

Other Advancement Departments

Your colleagues in communications, government relations, and development offer opportunities for alumni to provide positive reinforcement for the college's message. Successful, enthusiastic alumni provide a seal of approval for the institution's claim of academic excellence and societal relevance.

Communications

Your colleagues in the communications department are always looking for new and creative ways to express the institution's message. Alumni can be sources of professional success stories that enhance marketing and public relations strategies. Human interest stories about campus life in earlier days or life-changing experiences provide interesting publishing opportunities for various institutional publications.

As the alumni relations professional, you play a key role in bringing alumni and communications professionals together. You must know your alumni well enough to recognize when their successes and experiences fulfill the communications goals of your institution. Your ability to interact internally with your communications peers and externally with alumni will provide the potential for success.

Government Relations

Well-informed, well-trained alumni can be a defining force when they rally behind the institution's cause. Given the challenge of competing for dwindling government funds, alumni can be the difference between increased or declining appropriations.

Successful legislative advocacy requires true teamwork between alumni and the institution's government relations professionals. Alumni volunteers must be kept informed about pressing issues and ongoing concerns. Investigate working with your government relations colleagues to organize trips to visit state officials. Such visits provide alumni with the opportunity to work together for their shared passion—their alma mater. In turn, government officials receive a tangible view of the numbers of people who care about the future viability of your institution.

One point to remember: It is every bit as important to keep alumni informed after a legislative issue is decided as before an appropriation vote is taken. If you want to maintain alumni enthusiasm, you must inform them of the result of any advocacy effort they support. Too often, alumni professionals neglect this important step—to the detriment of future government relations activities.

Alumni participating in government relations activities learn a great deal about dwindling appropriations and, consequently, the importance of their personal donations. This side benefit has a strong impact on your ability to involve alumni with your development colleagues.

Development

Involving alumni in the life of your institution leads to alumni donations. When alumni have opportunities to remain connected with their institution, they will be ready to commit their dollars as well.

The relationship between alumni relations and development can be a true meeting of the minds or a management nightmare. To create the former, all parties must enter the relationship with a sense of trust and a willingness to share information.

As the alumni relations professional, you also may be responsible for the annual fund. If this is the case, the right hand will always know what the left hand is doing. You can create a strong relationship with your development colleagues by identifying alumni as prospects for larger gifts.

Always remember that "friend raising" comes before fund raising. At its core, an alumni relations program is synonymous with friend raising. As you make institutional friends within your alumni base, you will be expected to make them available to development for further cultivation and fund raising. Understanding that this task is one of your responsibilities will make your job easier.

Alumni relations and development professionals must have a strong understanding of one another's roles. Consider receiving formal training in fund raising as well as in alumni relations, and attend CASE conferences that focus on development issues. You will be a better advancement professional as a result.

THE OVERALL VISION

Opportunities to involve alumni with their institution are limited only by time, creativity, and resources. When you plan new opportunities for alumni involvement,

move deliberately and in concert with professionals from other departments. You want each alumni experience to be a positive one—for everyone involved.

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YOUNG ALUMNI PROGRAMMING

Transforming Our Future Today

Innes van Nostrand

Upper Canada College

The greatest strategic issue facing alumni relations professionals is how to better design and deliver our programs to meet today's and tomorrow's needs rather than yesterday's. Sometimes—by design or out of necessity (but most commonly by default)—educational institutions tend to replay the communications, events, and services that have met with success among traditional alumni audiences. As our understanding of demographics and segmentation becomes more sophisticated, however, we understand that successful programming for young alumni can be as unique as it is important. Our success as alumni relations leaders 10 years from now will be directly proportional to how well we understand young alumni, appreciate their unique characteristics, and plan for and deliver customized offerings to them.

This chapter outlines only a series of generalizations. They are not universally applicable, but they do describe trends. Not all of the ideas in this chapter will be appropriate at all institutions. The key is to understand who your alumni are demographically, what they think about your institution, what they want, and how to deliver programs that meet their needs.

YOUNG ALUMNI: WHO THEY ARE

Institutions define young alumni as those who have graduated within the previous 10 years, usually when they were their early twenties. Generally speaking, these alumni are

members of the "baby bust generation"—the population segment that lives in the shadow of the baby boomers. The "busters" are in the unfortunate position of following a generation that, partly because of its sheer size, has had a profound effect on societal structures, marketing, and decision making. We will also be seeing baby boomlets (the echo of the baby boom generation) as the boomers' children enter alumni communities.

Young alumni are important for many reasons. People often think of alumni as gray-haired, wealthy dinner-goers who are passionate and loyal about their alma maters. The reality for most institutions in North America is that the numbers of alumni grew dramatically in the late 1960s and 1970s, as a result of the flow of baby boomers into postsecondary institutions and increased social commitment to postsecondary education. Although most major donors are older than baby boomers, boomers and busters dominate most alumni associations. Yet, as in society generally, though baby boomers represent the numerically dominant segment, young alumni tend to make up a significant minority of alumni communities (often between a quarter and a third of overall alumni populations). Just as important, they tend to have significant amounts of disposable income and time. Finally, the student years and the period immediately after graduation are when lifelong connections and habits are formed. Therefore, the best alumni organizations offer sophisticated programming aimed at young alumni.

EXPERIENCES AND ATTITUDES

The core of the relationship between an institution and its alumni is an understanding of the attitudes and perceptions of the alumni population. Generally speaking, busters are cautious, conformist, often anti-intellectual, and pessimistic. Because of the lack of opportunity they have faced (relative to baby boomers), they often are frustrated, fearful, and angry. Their key concerns in life include the environment, parenting, continuing education, and a very strong commitment to friends. They are often very charitable, but they show their commitment primarily to organizations with which they have been directly involved. Overall, these characteristics are not encouraging. Although many of these descriptors are not as directly applicable to university and college graduates who have had greater opportunities for success, they do typify the generation.

HOW TO INVOLVE YOUNG ALUMNI

Perceptions, attitudes, and demographics generally are different for young alumni than for others; so are their programming needs. Educational institutions have developed many creative means by which to engage young alumni in their communities.

Alumni Programming for Current Students

In alumni relations work, there is a cliché about involving future alumni in their alumni associations while they are a captive audience—prior to graduation. There are numerous opportunities to accomplish this goal.

Student Alumni Associations

The most common way for alumni to link with students is the use of student alumni associations (SAA). CASE has published a primer for people starting these types of organizations called *Student Advancement Programs.* An SAA operates a wide range of programs that utilize students for alumni events and introduce them to their alumni associations. Whether through an SAA or not, current students can and should participate in special alumni events such as Homecoming, special reunions, donor and volunteer recognition events, local branch events, and educational programs. An SAA is a proven way to groom future alumni leaders, including volunteers and staff.

Beyond SAAs

Among many possible extensions of SAA programming are initiatives whereby alumni provide direct services to students. The most common examples are "send-offs" (in which local alumni send new students and their families off to school for their first year) and "welcome home" events (in which students are welcomed back for winter and summer breaks in their own communities.) These programs are especially effective in involving young alumni as key organizers and hosts. Not only will they know many current students, they also are better suited to create a comfortable, highly social, and fun environment for the students—a challenge beyond most alumni in their forties, fifties, and sixties. These programs provide opportunities for young alumni to take leadership roles in helping their successors.

Special Events

Some alumni groups organize events for graduating student leaders (from student government, student media, athletics, and so on) to congratulate them and prepare

them for volunteer activities as alumni. Many institutions also organize major events such as receptions, parties, dinners, and dances for all students.

Alumni Visibility

Involving alumni (young or old) as guest lecturers, in student mentoring programs (in person, shadowing, electronic, etc.), in displays, and in communications pieces can be powerful. Such visibility establishes student understanding that alumni play a vital, lifelong role in the campus community, and implicitly encourages involvement upon graduation.

Involving Students in Alumni Governance

The inclusion of current students in alumni association governance groups is a further means to help groom future young alumni for engagement. Interaction with alumni will orient students to the alumni culture, establish a commitment to involvement after graduation, and assist alumni operations by talent spotting/grooming.

Commencement: Making the Seamless Transition

Commencement must always be considered from both directions. Not only does it signify the end of the student phase of life, it should also generate excitement and connection about moving to the alumni phase of involvement.

Formal Presentations

There are many creative ways to use Commencement to introduce graduates to the alumni world. Formal presentations during the ceremony should include explicit reference to welcoming young alumni to their alumni association and outline the opportunities and responsibilities of membership. Some institutions include gift pledges by graduates.

Although fun is often the name of the game with young alumni, there is a time and a place for pomp and circumstance, and this is it. The best messages combine a tone of prestige and honor with a message of opportunity. Optimally, an alumni association representative (the lead volunteer) will be the person delivering the message.

Welcoming Activities

The Commencement ceremony also can be an occasion for the alumni association to offer a personal welcome to new members. Some institutions have alumni shake the hands of new graduates as they leave the dais; others use events around the

ceremony—including receptions and dinners (formal and casual)—as opportunities for older alumni to meet, congratulate, and personally welcome young alumni and their families.

Alumni Information

Commencement also is a good opportunity to provide information to prospective new members. Through grad packages (including gifts), booths, or other promotional information, institutions can use the high emotion and nostalgia of graduation to deliver key messages. Commencement is a prime time for the alumni association to show that it can be the vehicle for graduating students to stay in touch with classmates and mentors on the campus. It is the time to promote welcome events by chapters and young alumni clubs, as well as to provide opportunities for graduates to sign up for e-mail directories, merchandise, and other alumni programs. Most important, it is also a good time to start to get new address information.

ALUMNI COMMUNICATIONS: HOW TO DESIGN AN INFORMATION UMBILICAL CORD

Perhaps the characteristic in which young alumni differ most from older alumni is communications. The information age is here—and the expectations and reality of young alumni revolve around electronic communications. Although all of society is becoming conversant with the World Wide Web, young alumni are far more savvy and sophisticated in this regard. "Snail mail" and telephones are not nearly as immediate or effective with young alumni as they are with their predecessors.

Creating Electronic Communities

Many institutions are meeting this challenge by introducing electronic communities. Assigning permanent e-mail addresses to graduating students is a sure way to keep them electronically attached to their alma mater. Such programs assign to alumni, on a permanent basis, the e-mail addresses they had as students. As long as the alumni keep the institution updated with a current e-mail address, the institution can forward all e-mails sent to their permanent addresses. Because alumni used their student addresses for so long, their friends become accustomed to them. The alumni then don't have to worry about keeping their friends updated on changes to e-mail addresses. Permanent e-mail addresses are a valuable service and a powerful incentive for young alumni to stay in touch—one of the greatest challenges with recent grads.

World Wide Web Pages

World Wide Web pages are well-known ways to promote programs. Young alumni are more likely to visit home pages and take advantage of the opportunities offered there. The challenge is to provide out-of-the-ordinary elements that will engage savvy Web surfers repeatedly. In addition to general information, strong alumni Web pages can feature interactive elements such as contests (trivia quizzes), virtual events such as Homecoming for those far away, the opportunity to download information such as screen savers, up-to-date campus information, electronic directories of alumni and on-campus people, online services such as continuing education, career services and alumni event registrations, and chat rooms on general or specific issues.

Online Newsletters

Online newsletters are much faster and much cheaper than their paper equivalents. Young alumni tend to be well-connected to e-mail and will pay regular attention to what shows up in their virtual mail boxes. They are more likely to take 30 seconds to read and reply to an e-mail than to take 10 minutes to do the same for a conventional communication. In more sophisticated operations, electronic media allow institutions to better customize communications to personal interests and needs.

Listservs

For young alumni, listservs are the class notes of the future—and, in some cases, the present. They provide classes or other affinity groups the opportunity to stay more dynamically and interactively connected with one another than any alumni publication. Members can post personal updates, organize and promote events, and share institutional news.

Targeted Communications

In addition to electronic communications needs, young alumni have shown greater interest in communications from smaller units at their institutions. Newsletters from faculties, departments, and student groups are in greater demand among younger alumni, mostly as a consequence of more specific points of affinity.

ENGAGING ALUMNI IN THE LIFE AND WORK OF THE INSTITUTION

The most significant level of participation that alumni can make is to volunteer for

their alma mater. Personal connection is at a peak when someone volunteers for an organization. Young alumni are much more willing and able to volunteer for their alma maters than their older counterparts—if the situation is right.

Traditional Alumni Volunteer Roles

Traditional alumni volunteer roles are more attractive to young alumni than to boomers or older alumni. Positions on chapter boards and class committees appeal to almost twice as many busters as others. Their fresh approach and commitment also makes them very suitable for these networking roles. As noted above, it is important to link with them as students and in the six months after graduation, before they have overcommitted themselves. Focus on programs that appeal to their cohort, such as through young alumni clubs.

Additional Alumni Volunteer Opportunities

Although young alumni are great prospects for traditional alumni volunteer roles, institutions can truly engage two to three times as many of them by providing opportunities to help students and their broader communities. More than any other generation, young alumni are willing to assist current and prospective students through recruitment, mentoring, send-offs, and admissions interviewing. Typically, more than twice as many young alumni as others report their willingness to assist with these programs.

Mentoring Programs

Mentoring programs can include one-on-one partnering, job shadowing, speaking to student groups about career choices, electronic mentoring, and other networking roles. Although career mentoring often is the focus, events such as send-offs also are ways for young alumni to assist students and their families while staying connected with the lifeblood of the institution.

Alumni Involvement in Recruitment/Admissions

The involvement of alumni in recruitment and admissions processes can be controversial, yet highly rewarding. Young alumni, because of their recent experiences and age, can be best suited for connecting with high school students. They also are more in touch with many of the issues that high school students may be considering.

The best hook to engage young alumni is to provide them with the opportunity to directly improve the lives of individual students. They can see the tangible benefits

and feel the appreciation of people they can relate to. There is no greater motivator for young alumni than being relevant and charitable and having an impact.

Community Service Programs

Many institutions and alumni groups have embraced community service programs. These innovative initiatives are very appealing for young alumni. They speak to the values of the baby bust generation—charity, relevance, non-intellectual—in the context of an educational institution. Programs such as literacy efforts, mentoring of inner-city children, and providing homes for the homeless will make alumni associations relevant and meaningful for their younger members. An enthusiastic group of recent graduates can spearhead this type of program.

BUILDING ON THE FUN OF STUDENT YEARS

Members of the baby bust generation are prime candidates for social events. College often is the most exciting and socially active time of someone's life. This lifestyle doesn't dissipate after graduation, and friendships are strong links to and incentives for alumni involvement.

Alumni Clubs

Alumni clubs are effective ways to provide a focus for this population. Organized centrally and regionally, these bodies provide popular programming for recent graduates. Although pub nights are typical events, these clubs also initiate sport teams and competitions, community service projects, galas, and other parties. Often, they bridge campus-based social successes such as Homecoming to the alumni arena, thereby linking to nostalgia and current social interests.

Social Activities

A welcoming party for new graduates moving to a city the fall after graduation can be one of the most effective young alumni events. For purely social events and young alumni clubs to be most successful, it is important to have a critical mass of younger alumni. Although a wine and cheese reception with a mix of older and younger alumni may be a good networking opportunity, it is not a buster's idea of a really good time.

Dances

Dances are exciting, high-profile ways to connect. They can provide the feeling of a graduation formal, after graduation. The dinner and dance combination can be a home run for young alumni, if there is a large concentration of recent graduates (i.e., thousands) in an area. Such events often are marketed through class leaders. They may include entertainment from the college, such as the college marching band or a popular dance band, as well as some upper class students.

Reunions

Reunions often take place every five years. To better link with recent graduates, many institutions arrange for reunion events on an annual basis. Often the class volunteers are willing and able to organize golf tournaments, pub nights, and other functions either at the campus or in a city where most of the class members live. These events can be established on an annual basis and tied to fund raising for a class project or other charities. Sometimes they are linked with other events for young alumni, such as Homecoming (a first reunion).

Affinity Services

Although affinity services offered in conjunction with private sector partners are controversial among many alumni, recent graduates often are the best target market. Because young graduates are starting out in their careers and are interested in financial benefits, they can best take advantage of programs such as financial planning, insurance, and other services. Better deals are very appealing to busters—and they have rarely established strong relations with suppliers prior to graduation.

Merchandise featuring school colors, logos, and slogans is a popular offering with many alumni. Recent graduates often are prime candidates for these products because of their pride in completing their degrees and their feelings of nostalgia when they leave the campus. As with communications, it important to use graphics and designs that combine a hip feel and the flavor of the institution.

Career Services

Career programs may be the service of greatest appeal and benefit to young alumni. Many institutions offer dedicated, comprehensive alumni career services such as personal counseling, job postings, seminars, and conferences. Others offer similar programs through student career services offices. Young alumni are in a volatile stage of their careers, in which they often experience significant change and

experimentation. Assistance at this stage of their lives can generate immense goodwill for the future, and there is no greater way to help than assisting with their careers.

CONCLUSION

Much has been written about the challenge of the baby bust generation. These alumni are critical to the success of all alumni associations and educational institutions, now and in the future. Although their attitudes, interest, and needs often are different than those of graduates who have gone before, they offer tremendous potential. The challenge of the alumni professional is to focus on these young alumni, understand them, and make sure their needs are being addressed. These young alumni have good feelings about their experiences and a commitment to the broader good. The opportunities are significant—and young alumni programming is an exciting way to add innovation to an alumni relations program.

19

CAREER PATHS

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Welcome to the alumni profession. I hope you will find this field as rewarding and interesting as I do. I look forward to going to work knowing that my days will be varied and filled with interesting contacts, travel, and challenging issues.

The purpose of this chapter is to encourage you to think about potential long-term opportunities within the alumni field. There is no better time for a new alumni professional to consider where your assignment may lead. Perhaps you came into the field by accident or by default; maybe you want to be head of an alumni office someday. You might be waiting for further education or putting a significant other through school. Whatever the reason, you will probably find yourself drawn to the field because of the enthusiasm of your colleagues and the interesting and diverse backgrounds of your alumni volunteers.

You might (reasonably) assume that if you work hard and achieve goals set by your supervisor and yourself, you will move up in the organization and eventually assume a senior management position in alumni relations. At times, however, promising young professionals leave the field prematurely. In this chapter, I hope to motivate you to stay in the field of alumni relations.

Unfortunately, as you already know, alumni relations professionals are not as highly paid as our contemporaries in the corporate world. For the most part, even our colleagues in development are better compensated than we are. In fact, because many of the skills required for success in alumni and development are similar, alumni personnel often apply for development positions when openings occur. From an institutional standpoint, such an internal move often is desirable because key volunteers already are acquainted with the alumni staffer and such a move is a natural

step in volunteer stewardship. And let's face it—every employee in an advancement office does development work anyway!

Before you jump too quickly to a development office, however, take stock of the positive atmosphere and intrinsic benefits your alumni office may offer. How many people can be in a helping profession in which your clients (in this case, alumni) already are pre-sold on the product you are marketing (namely, your institution)?

Young alumni professionals can readily transfer skills gained in alumni affairs to a variety of other areas on and off campus. Many professional possibilities exist within the university—including external relations, public affairs, career services, orientation, and parent programming, to name just a few. Private-industry positions may arise in areas such as marketing, accounting, public relations, computers, or graphic design, depending on your area of expertise. Although you may eventually jump to private industry, keep in mind what you would be giving up. To most people in private industry, the idea of working in a university setting is very attractive.

Unlike many other educational fields, alumni relations lacks degree programs. Degree programs tend to provide stability and continuity—a home base, if you will. By creating a network of colleagues within your institution and at other colleges and universities and becoming active in professional organizations such as CASE, however, you can provide your own in-service education.

Unfortunately, many alumni organizations are unable to or fail to promote from within—at least, not quickly enough for many new professionals. Often, executive directors and other senior alumni officers come from outside the campus or from the volunteer ranks. So although young professionals may have opportunities, they also may feel that good work will go unrewarded. That is why it is so important to candidly discuss your professional goals with your supervisor and/or executive director.

I can truthfully say that after 19 years in student affairs, I have thoroughly enjoyed my 13 years in alumni relations, in spite of the challenges. The switch from student affairs to alumni affairs is not uncommon. Both professions are useful and interesting, and both involve transferable skills. Here is something to ponder, however: Many of my former student affairs colleagues are now working in alumni relations, but very few alumni professionals have moved to student affairs. You can draw your own conclusions!

Once you have decided to pursue a career in alumni relations, make an appointment with the executive director and your immediate supervisor to discuss your long-term options. Explain that you want advice and assistance in moving ahead. You will probably be encouraged by the response you receive; most of us want the best

for our employees. Don't wait until you are halfway out the door before you make your needs known. By discussing your career options within the alumni office and making your desires known to your supervisors, you are likely to greatly increase your job satisfaction and longevity. I hope you will find that the alumni profession is a fulfilling way to spend your professional years. Good luck in the alumni field.

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